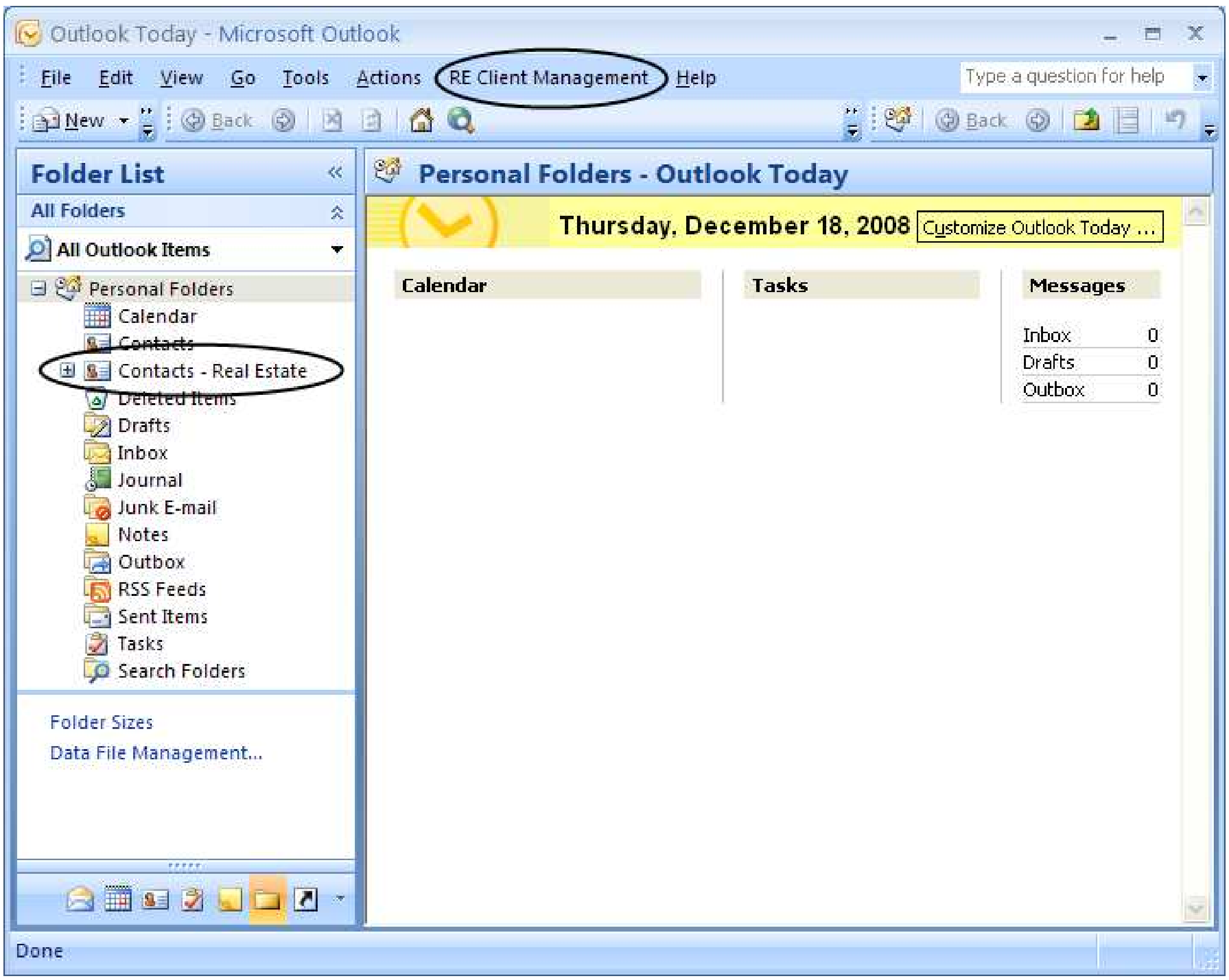
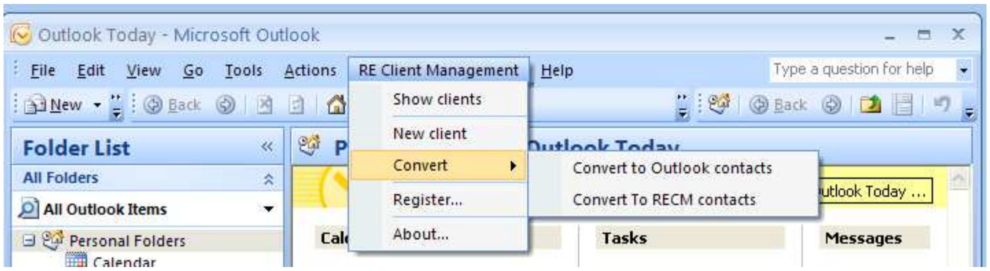
REAL ESTATE CLIENT MANAGEMENT QUICK START GUIDE

The purpose of the quick start guide is to help you get started using the Real Estate Client Management (RECM) product quickly. For a more in-depth quick start, watch the Overview Tutorial video at: www.RealEstateClientManagement.com/Tutorial.aspx

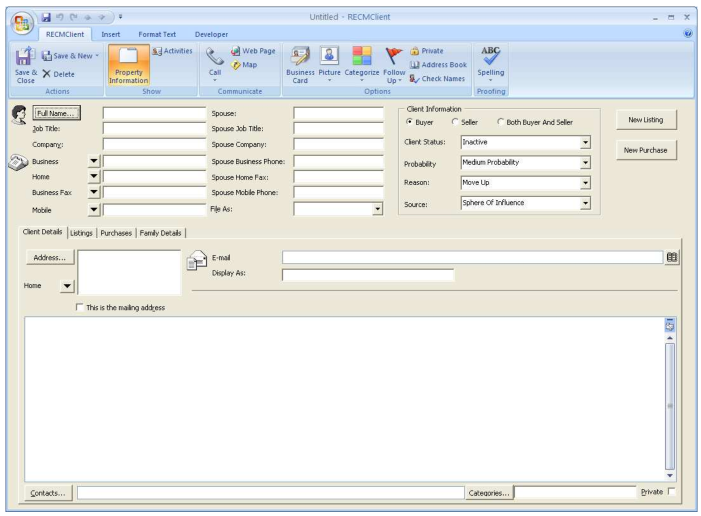
When you first open Microsoft Outlook after the installation, you'll notice a new menu item (RE Client Management) and a new contact folder (Contacts-Real Estate). We'll walk you through each of these.



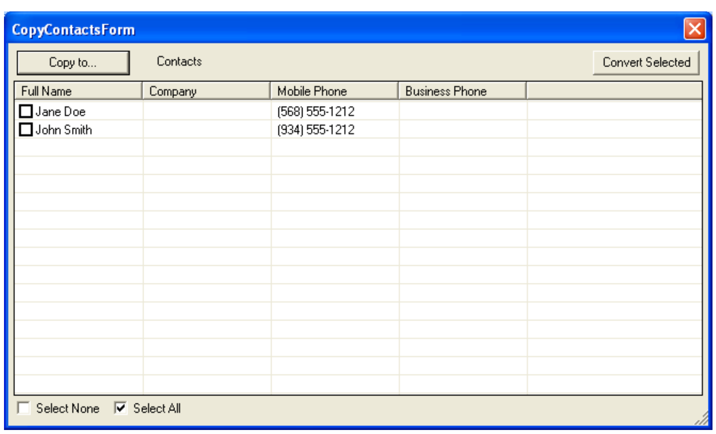
RE Client Management Menu



1. **Show clients.** Opens the “Contacts – Real Estate” folder. This is where your Real Estate Contacts are kept.
2. **New Client.** Creates a new Real Estate Contact. We’ll walk through the forms in the next section.

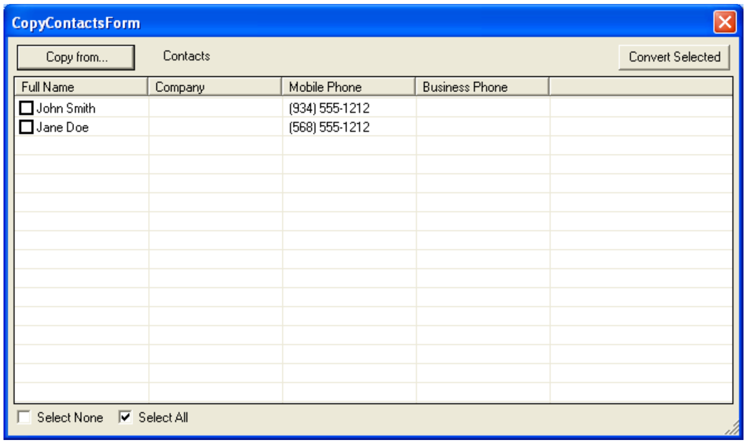


3. **Convert to Outlook contacts.** This will convert your RECM contacts back to the standard Microsoft Outlook format and copy them to the selected “Contacts” folder.



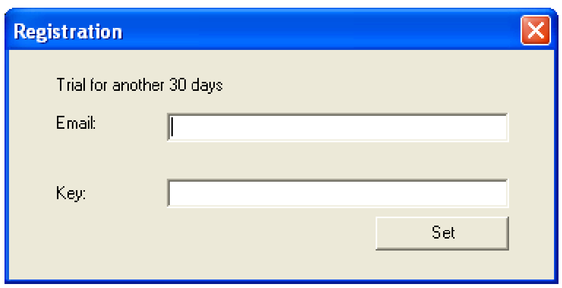
   a. Select “Copy to …” to select the folder you’d like the converted contacts copied to.
   b. Check the contacts you wish to convert and then select “Convert Selected” to convert the contacts back to Microsoft Outlook format.

4. **Convert to RECM Contacts.** This allows you to convert your standard Microsoft Outlook contacts to RECM format. The Microsoft Outlook contacts will be left in their current folder and a copy created in the "Contacts – Real Estate".

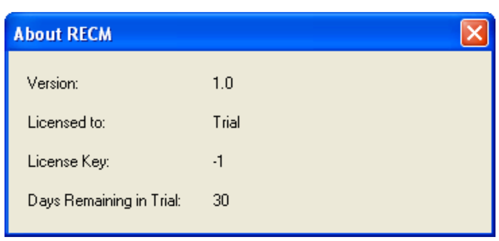


   a. Select "Copy From" to choose the folder you wish to convert the contacts from
   b. Check the contacts you wish to convert then select "Convert Selected" to convert the contact to RECM format

5. **Register…** Register your product with your Email address you used to purchase RECM and the Key that was sent to you with your order. Visit www.RealEstateClientManagement/BuyNow.aspx to purchase RECM.

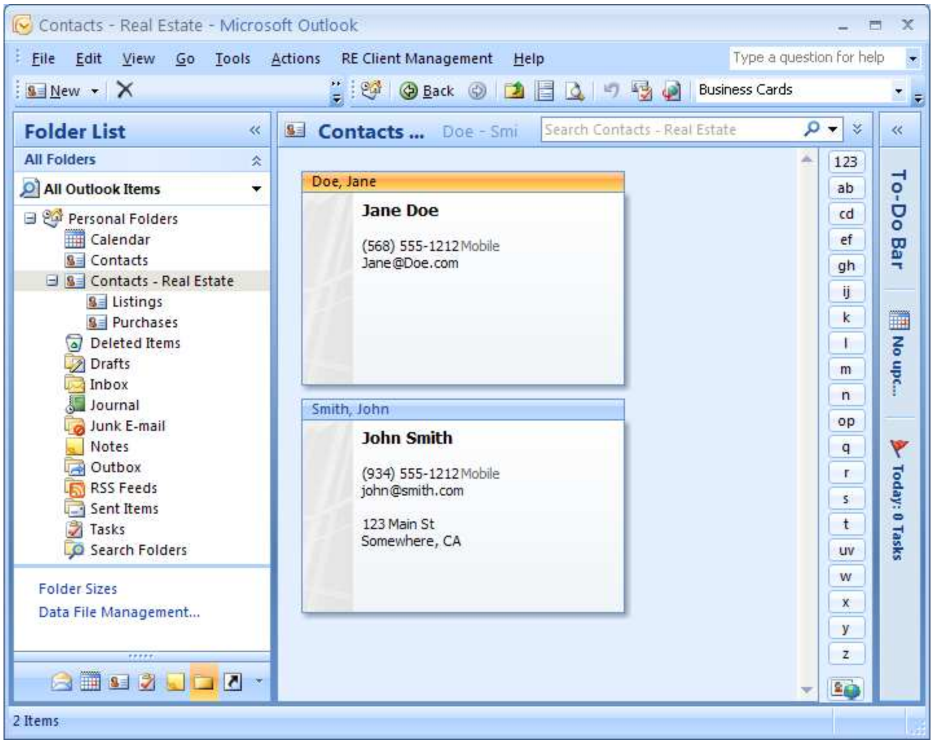


6. **About.** Shows information on RECM such as version number and registration information. If you haven't registered, it will also show the days remaining on your trial.



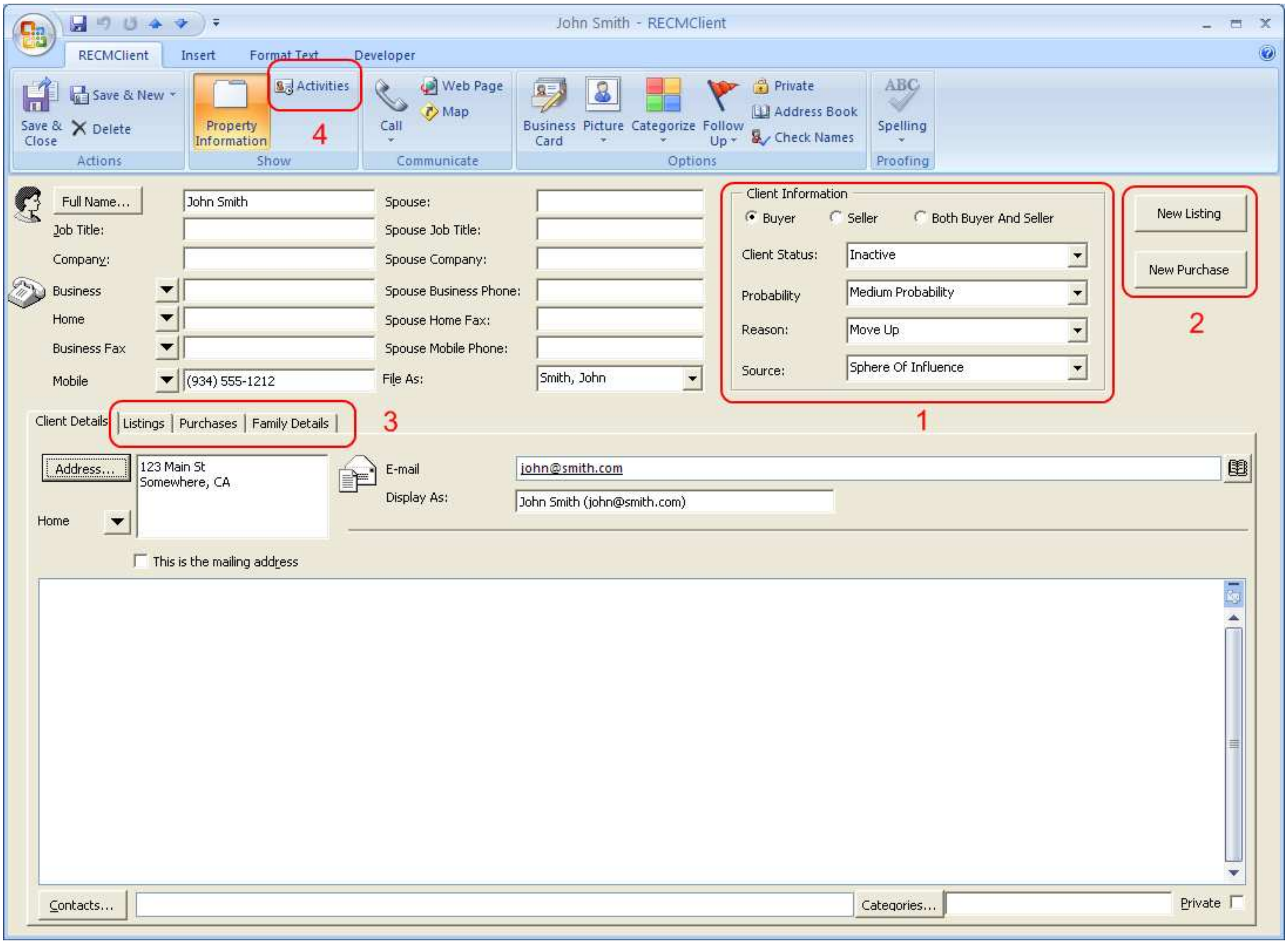
CONTACTS – REAL ESTATE FOLDER

When you installed RECM, three folders where created: The main folder “Contacts – Real Estate” and two sub-folders: “Listings” and “Purchases”. The “Contacts-Real Estate” folder contains Client Contact forms. For each Client, you can create multiple Seller Listing (stored in the “Listing” folder) and multiple Buyer Purchase (stored in the “Purchase” folder).



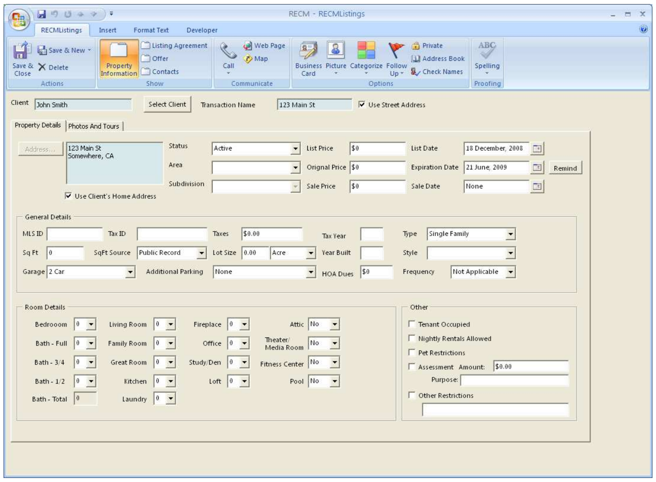
1. To create a New Client contact, select “New Client” from the RE Client Management menu. Or, you can double click within the folder (just like creating any standard Microsoft Outlook contact). This will open a new Client Form.
2. To open an existing Client contact, just double click on the contact.

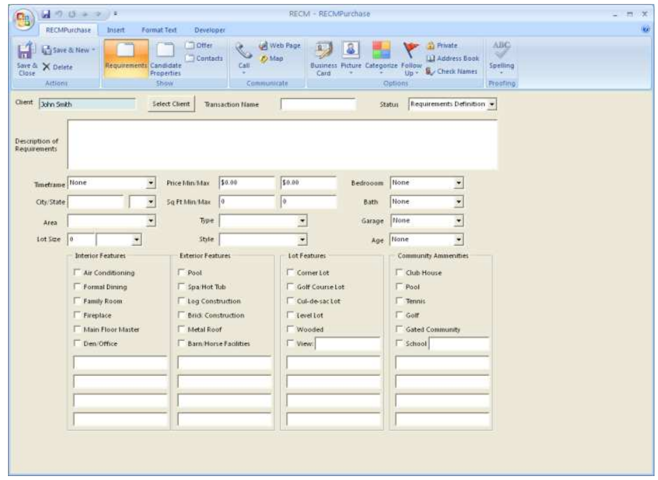
Client Form



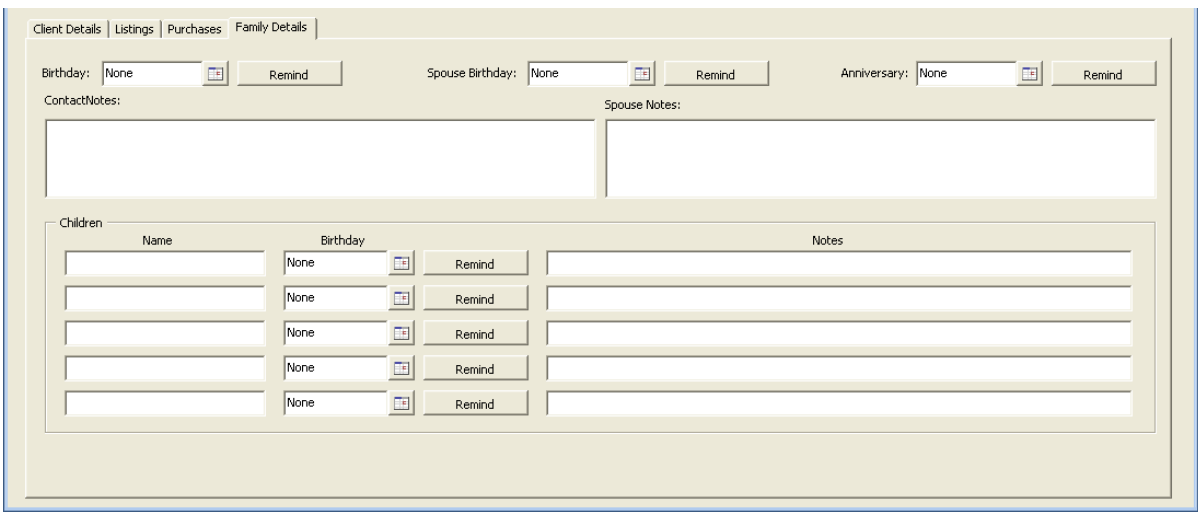
In addition to the Client and their Spouse (significant other) information, there are three new areas: 1) Client Information; 2) Create a New Transaction; 3) Listing, Purchase, and Family Details tabs. We've also marked 4) Activities – this is a standard page on any Microsoft Outlook form but one that we find a lot of Outlook users don't know about.

1. Client Information. This lets you track specific information on the client type, status, probability of a transaction, why they're working with you and the source of the lead. You can edit the Reasons and Sources. The other fields will be used for report generation and are not editable.
2. Create a new Listing or Purchase transaction. Will discuss these forms in a the next sections.

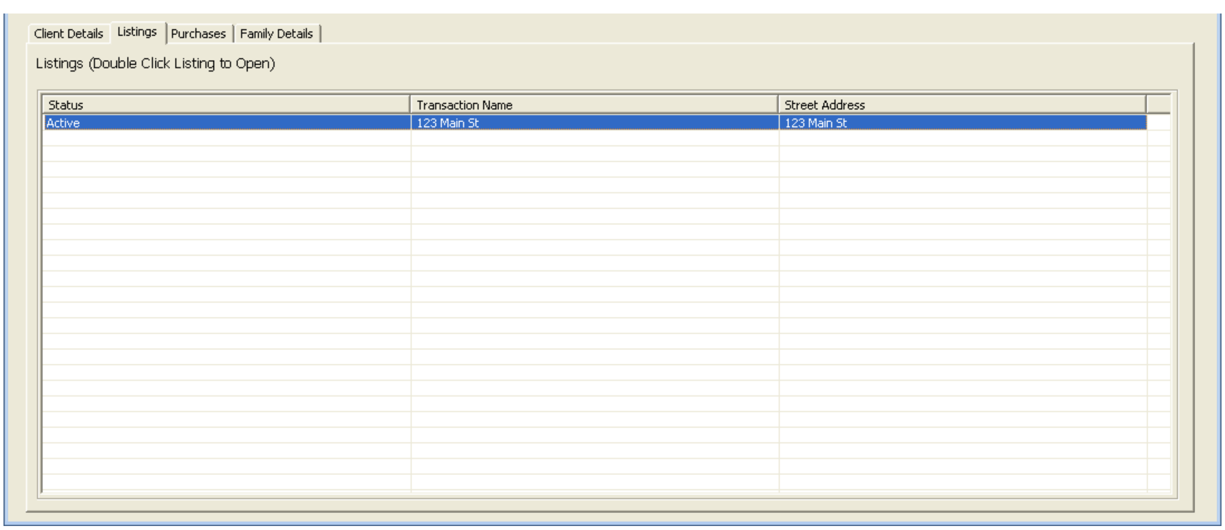




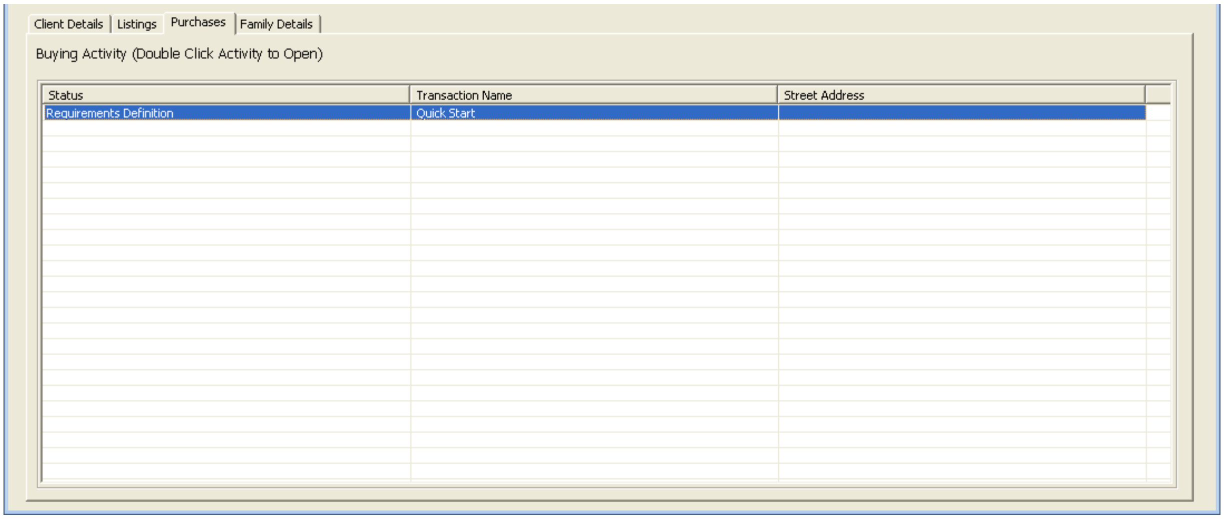
3. Tabs
   a. Family Details. This tab allows you to track details like Birthdays, Anniversaries, Children. If you click on the calendar icon, a date picker will pop up allowing you to enter a date. If you click on the remind button, then an appointment form will open set to the date you entered. You can chose to make this a onetime event or reoccurring event.



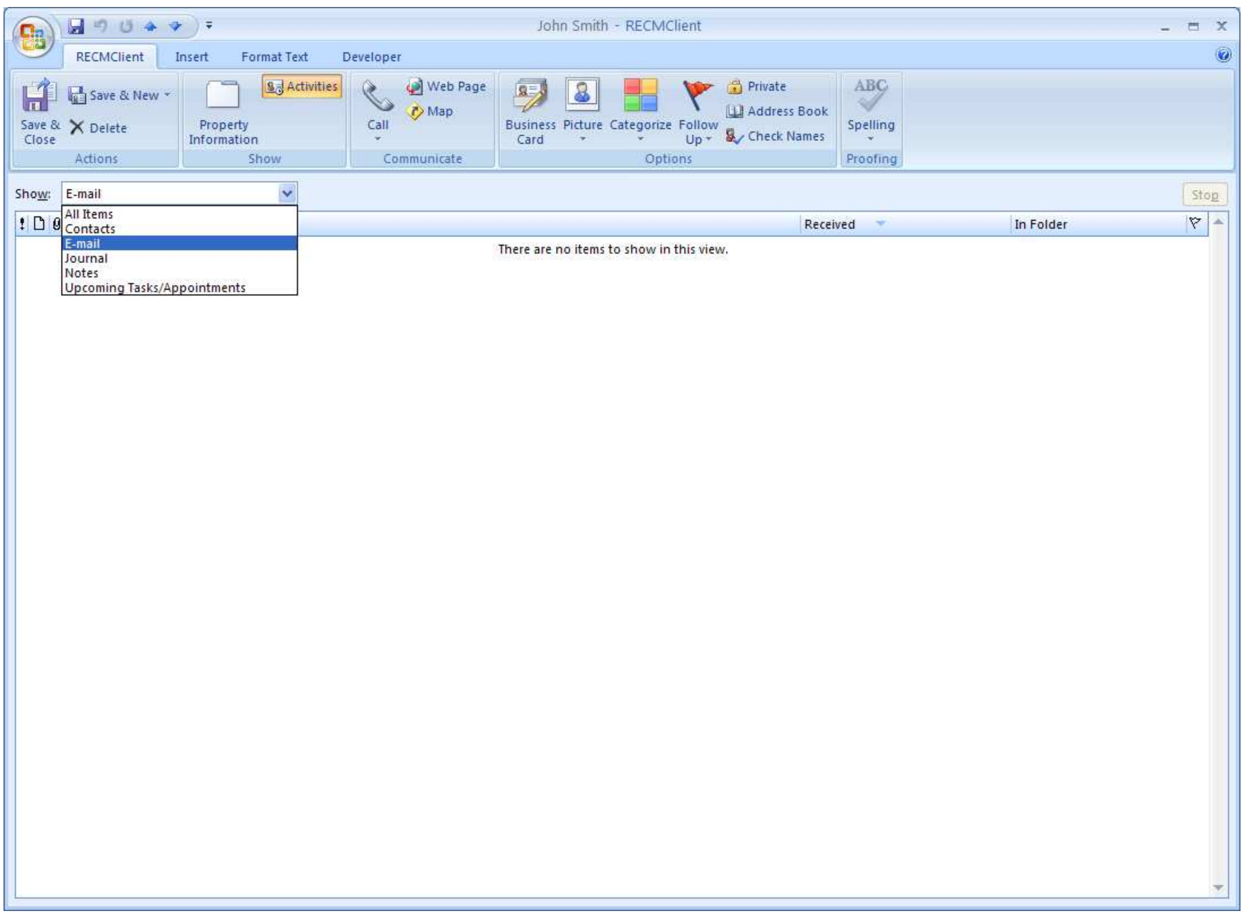
   b. Listings. If you have created and saved a listing then it will appear on this tab. You can double click the Listing to open it.



c. Purchases. If you have already create and saved a Purchase then it will appear on this tab. You can double click the purchase transaction to open it.



4. Activities Page. This is very powerful tool found on any Microsoft Outlook contact form and we've incorporated it into our form as well. Basically it allows you to find activities (emails, appointments, tasks, etc.) that are associated with this contact.



LISTING FORM

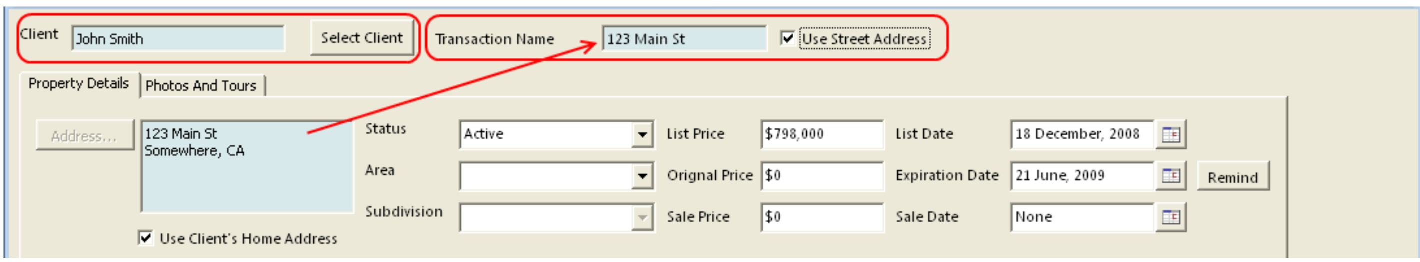
Forms for each Listing transaction are kept in the Listing folder. We strongly suggest that you only create Listing Forms via the Client Form. This ensures that the each listing transaction is properly associated with a specific client.

There are four main pages on the Listing Form: 1) Property Information; 2) Listing Agreement; 3) Offer; and 4) Contacts. This guide will give a quick overview of each.

PROPERTY INFORMATION PAGE

1. CLIENT TO LISTING FORM RELATIONSHIP

At the top of the Property Information there are two critical fields: Client and Transaction Name. These two fields are combined (<client name> <transaction name> … i.e. John Smith 123 Main St) to create a unique identifier for the transaction. If you were to look in the Contacts – Real Estate / Listings folder, you would see the below form named "John Smith 123 Main St".



If you create the Listing form from the "New Listing" button in the Client Form, then the Client's Name is automatically filled in for you and a relationship established between that client and this listing. If you choose to create the listing form another way (e.g. double clicking from within the listing folder) then you'll need to click the "Select Client" button and choose a client to associate the listing with.

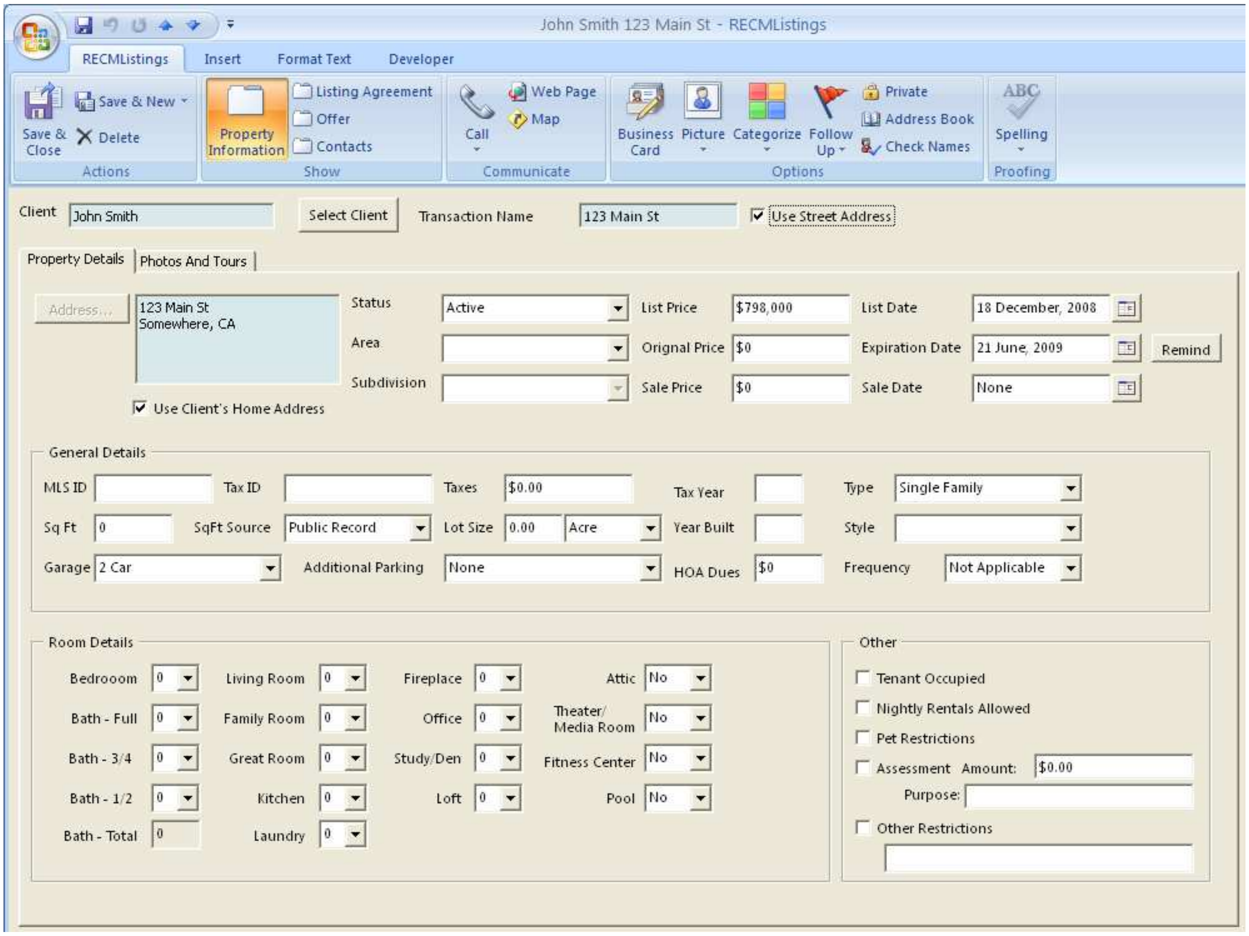
Notice that if you create the listing from the Client form, the listing address is automatically filled in using from the clients home address. To enter a different address, uncheck the "Use Client's Home Address"

The "Transaction Name" is uses the Listing's street address as default. If you enter a different name, uncheck "Use Street Address".

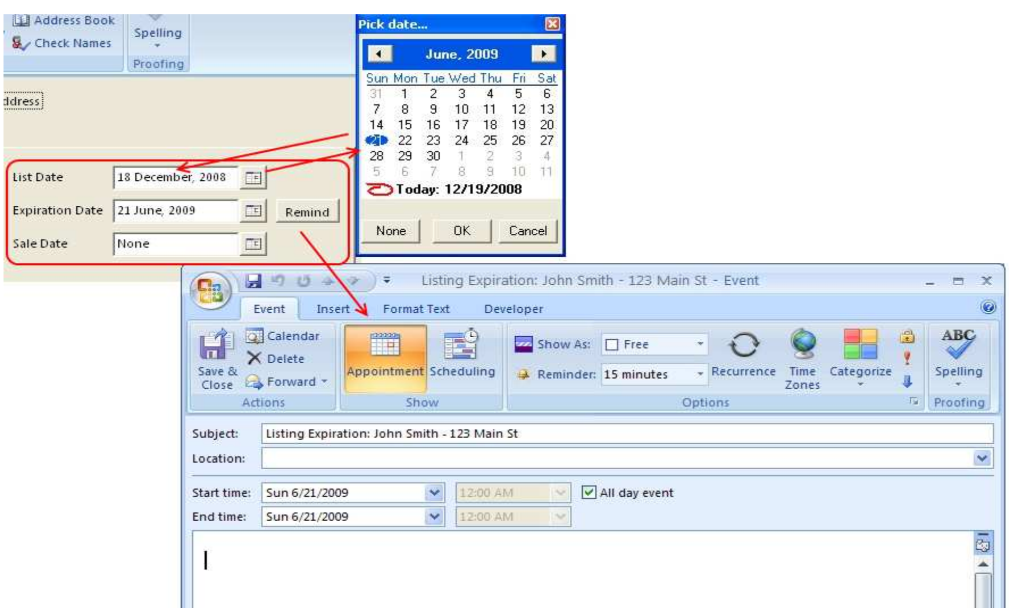
We strongly recommend that you create your listings through the Client Form. This will ensure that a proper Client to Listing relationship is setup. And, fills in the critical parts of the Listing form for you.

2. PROPERTY DETAILS TAB

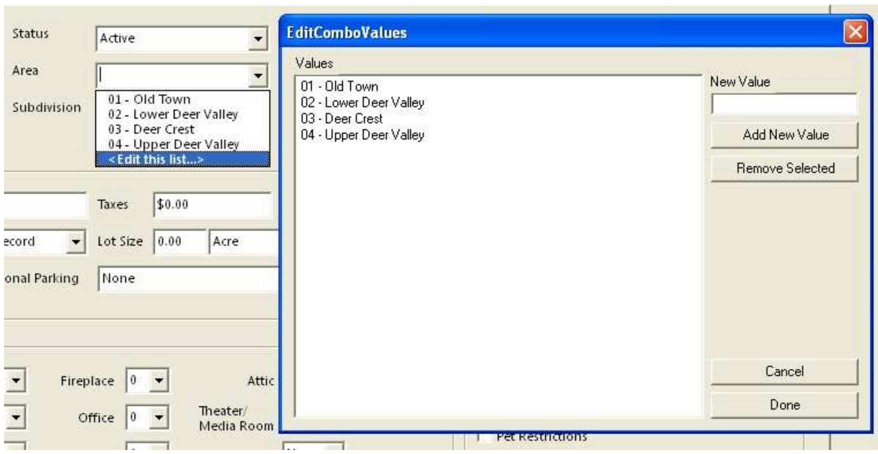
Except for the street Address, the other fields on the Property Details are optional. But, we would recommend filling in at least the “List Price”, setting the List Date, and setting the Expiration Date.



To create a reminder for the Expiration date, click the “Remind” button. This creates an calendar appointment with the subject being the Listing Expiration : <client Name> - <transaction name> (in this case Listing Expiration: John Smith - 123 Main St).

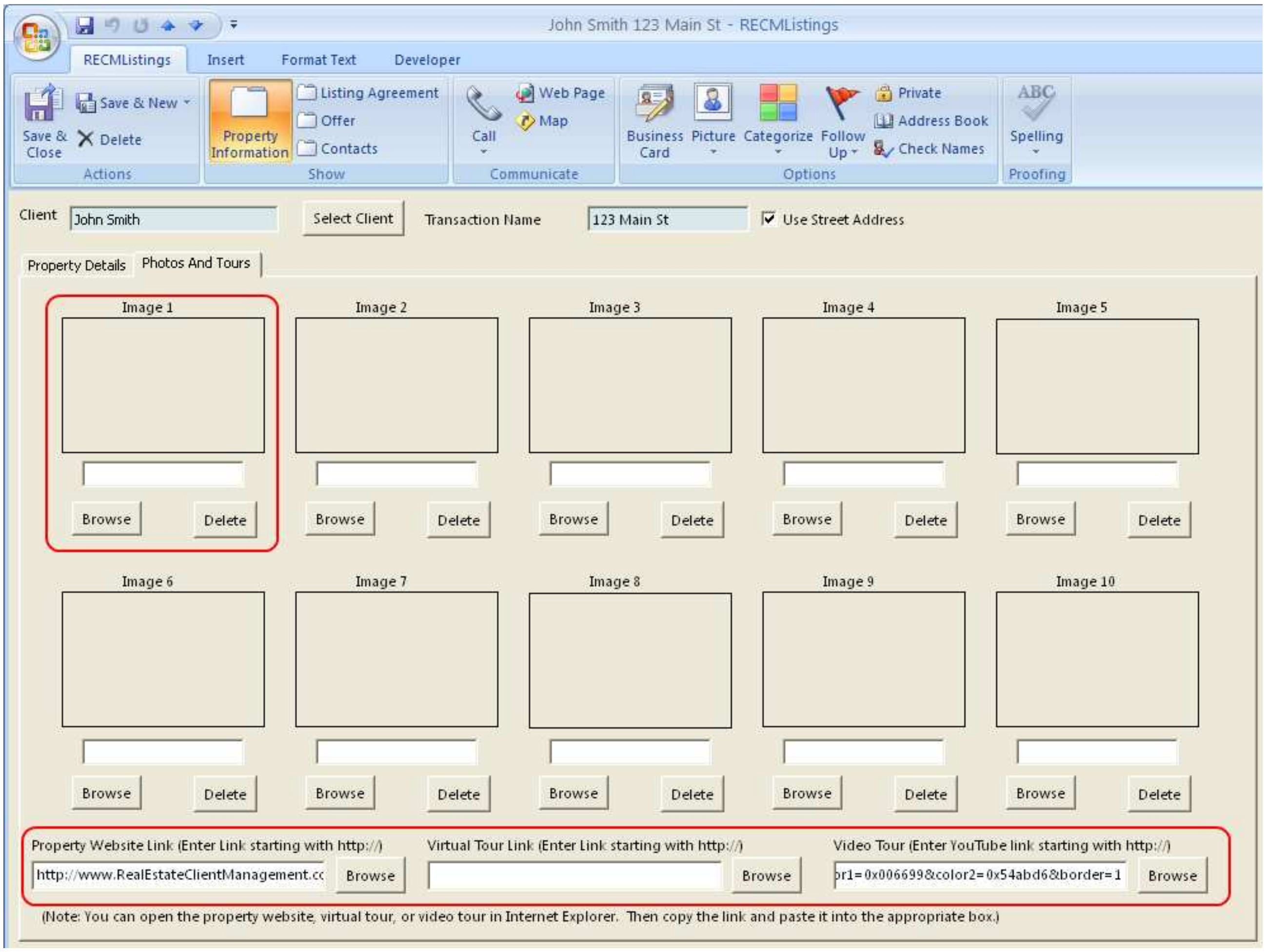


You can also edit the values for many of the dropdown fields. These changes will be available for all forms. So in the example below, the “Area” dropdown was edited. If you open the “Area” field on the Purchase Form, the values you input here would be available there. We recommend that you take a few moments to enter the values for your local market – then they will be available whenever you create a new listing or purchase transaction.



3. **PHOTOS AND TOURS TAB**

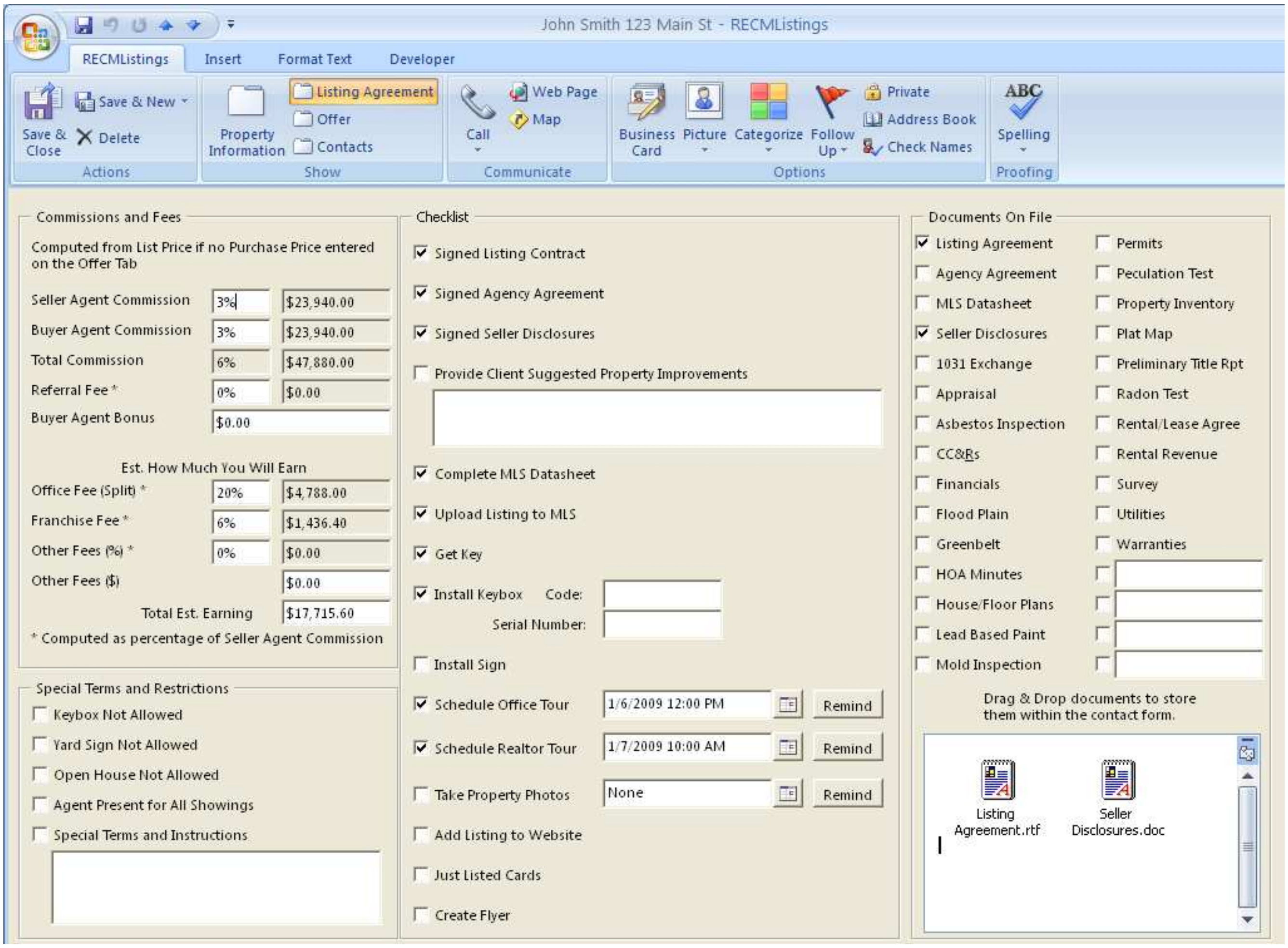
To upload a photo, click on the browse button under the image. This will pop-up a file selection window. Navigate to the windows folder containing your image, select it, and press Open. Future releases of the Real Estate Client Management application will use the information of this tab to create flyers and other documents.



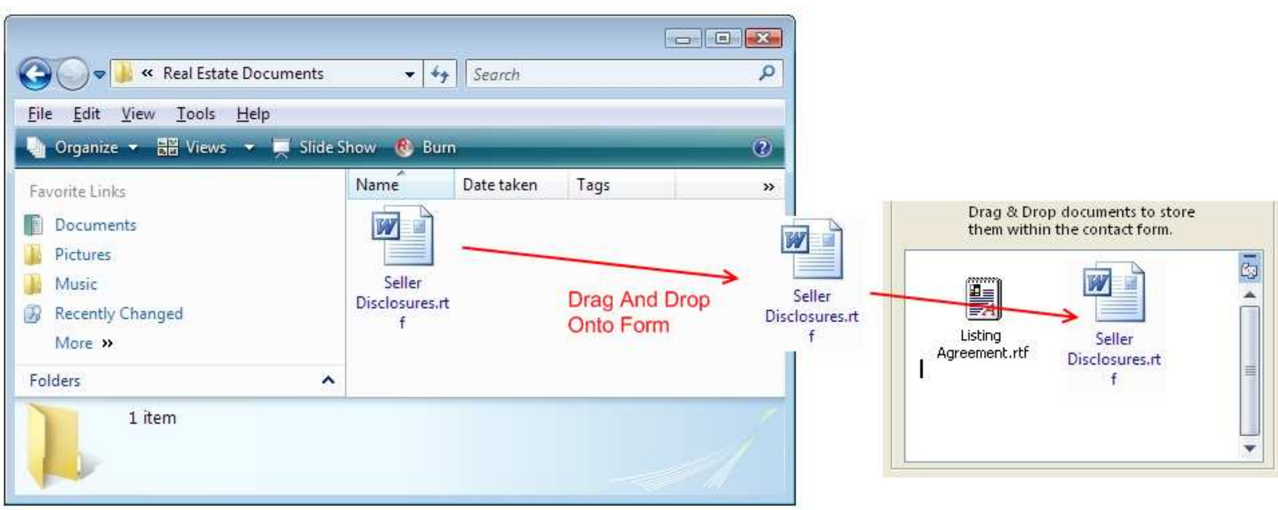
At the bottom of the Photos and Tours tab, you can enter the web links to your Property Website, Virtual Tour, and YouTube Video Tour. After entering the link, you can click on the "Browse" button to open the link in Internet Explorer (or your default browser if you use a different one).

LISTING AGREEMENT PAGE

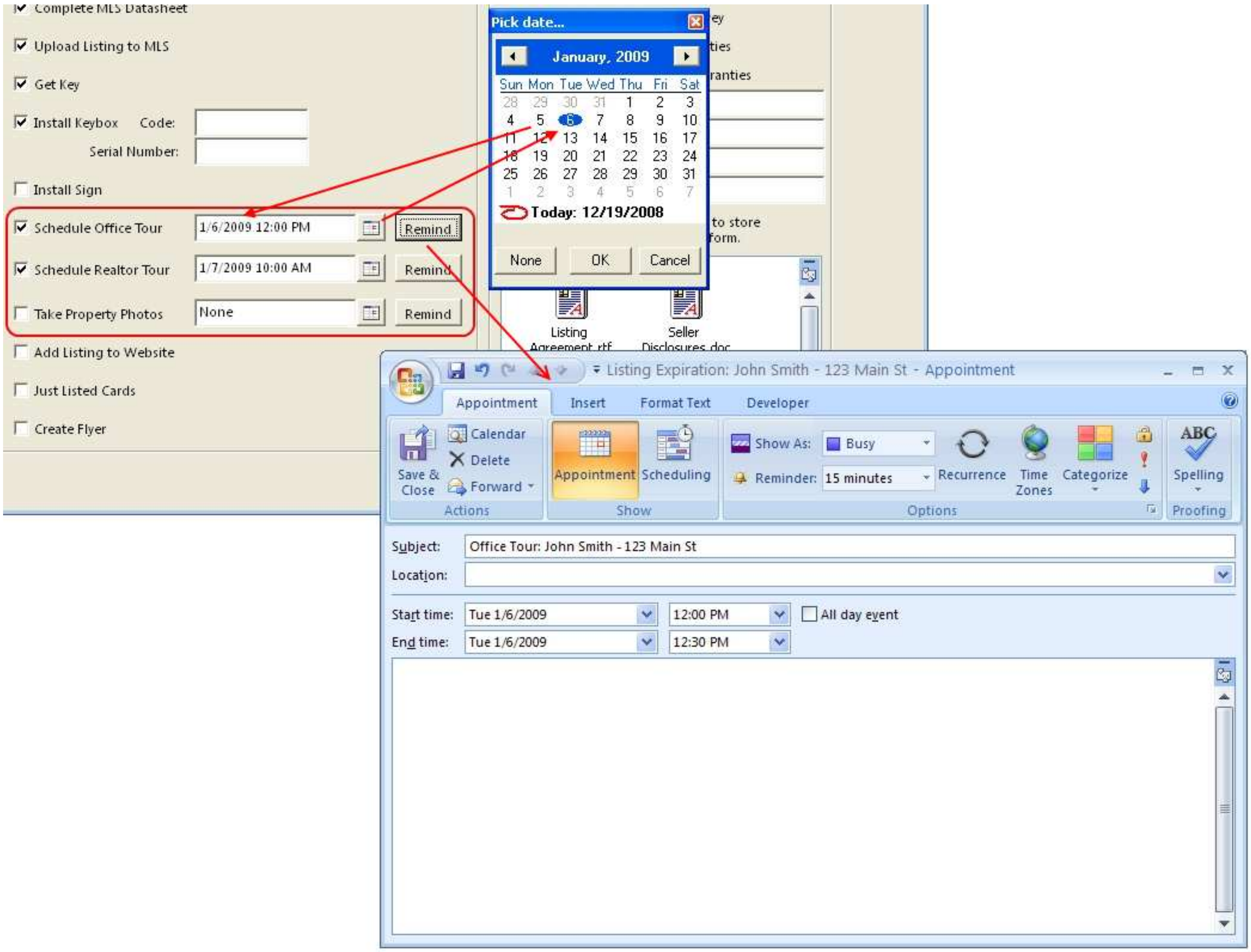
The Listing Agreement tab allows you to track critical details of your listing from a Checklist of items to consider when you first take the listing to tracking which documents you have on file. We've also included a tool to estimate your commission.



You can also store critical documents within the associated transaction. Simply drag and drop the document from a windows folder or from an email into the document storage area. No more searching for documents … the critical ones are now stored within the Listing form.

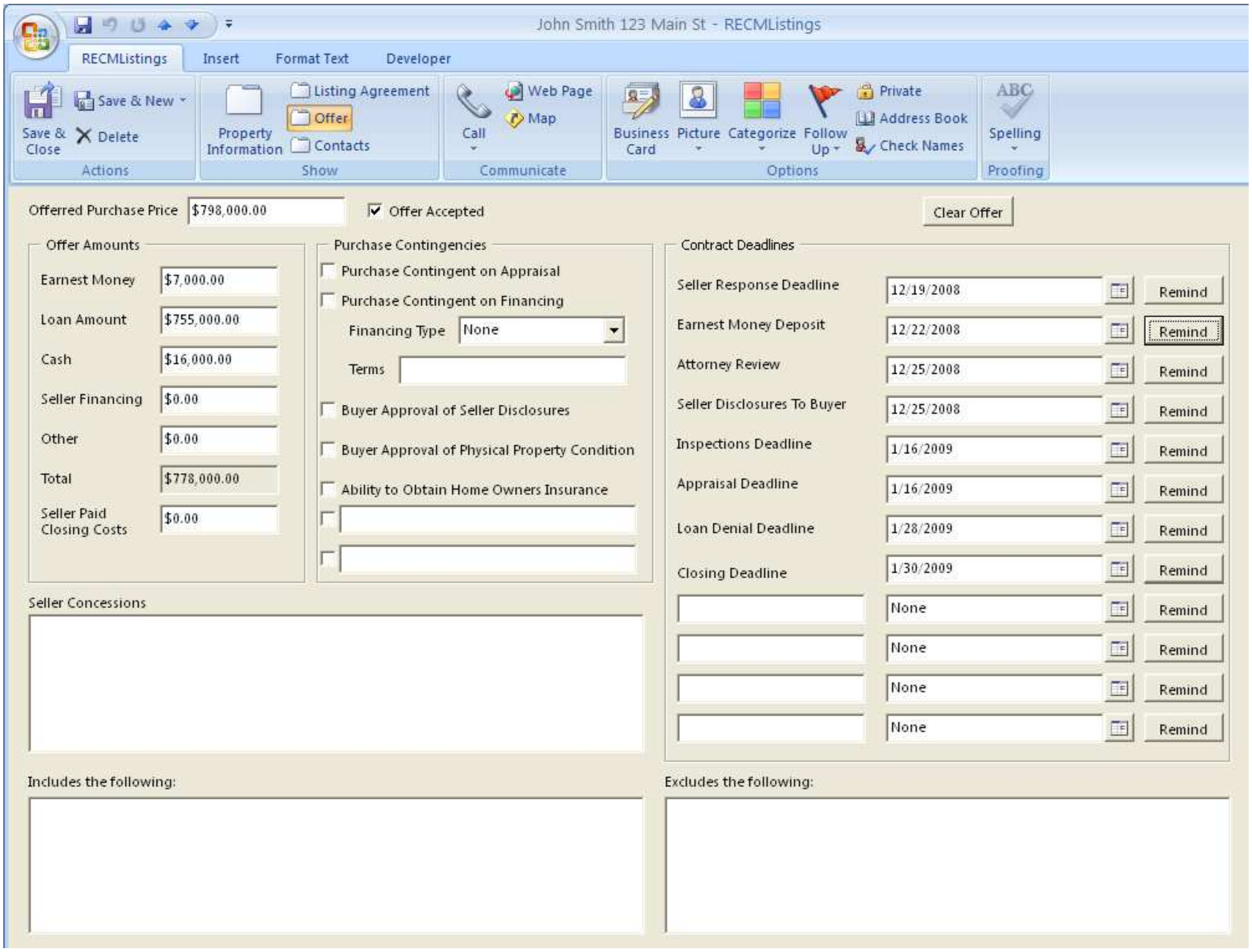


When you take the listing, you normally will schedule for the listing to be on your Office and Local Realtor Tours and to take the Property Photos. You can schedule the date and time for the tour. To set the date and time, can just manually enter them. You can also set the date by clicking the calendar icon which will bring up the Date Picker … choose the date and select “OK”. Then set a Reminder/Appointment by clicking on the “Remind” button. This will create



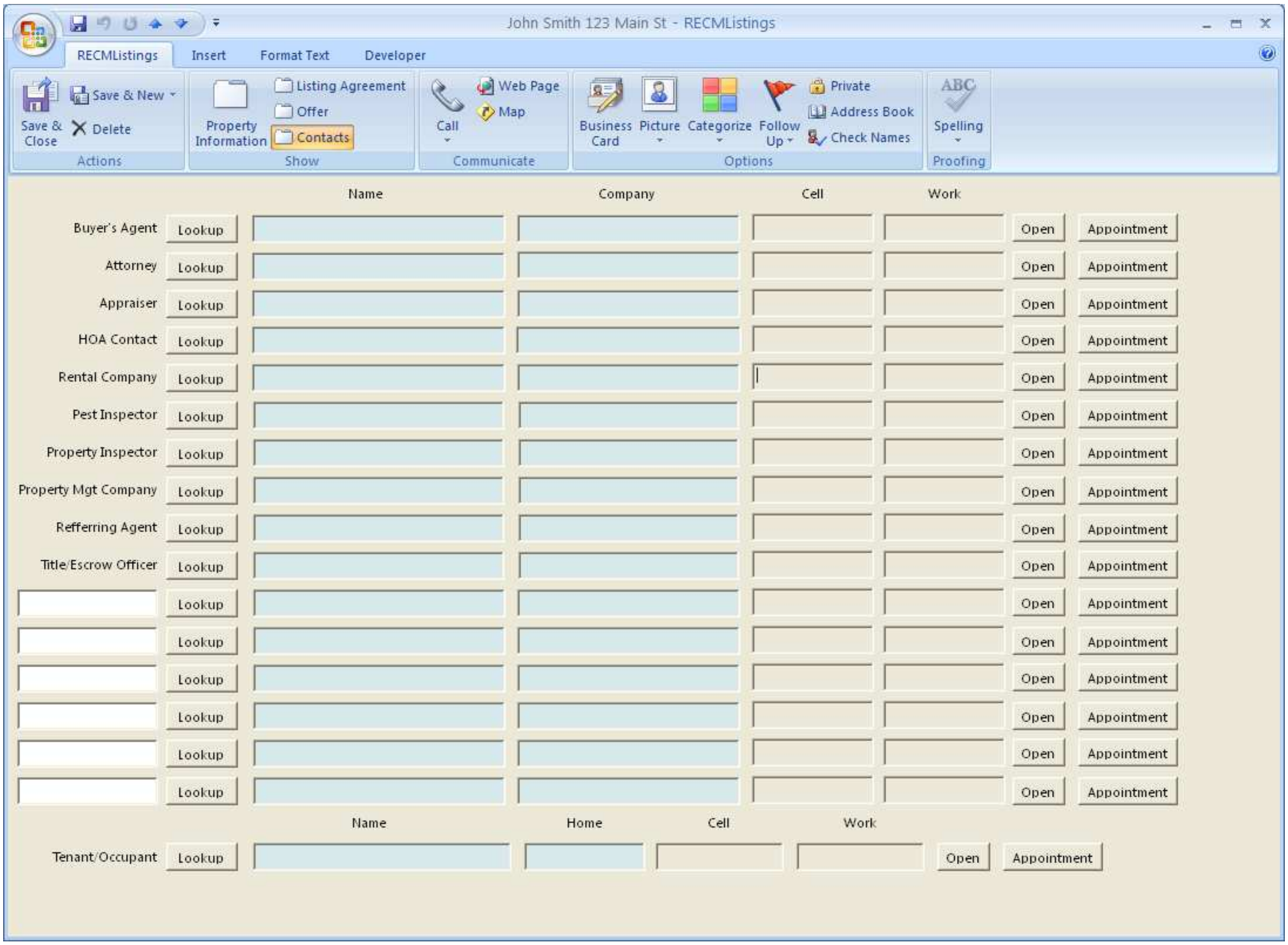
Offer Page

The Offer Tab contains critical information on any offers you receive on the property. If the offer falls through, you can clear all the information, including reminder appointments by clicking the "Clear Offer" button on the upper right side of the page. You also have the ability to set dates and reminders for critical deadlines.

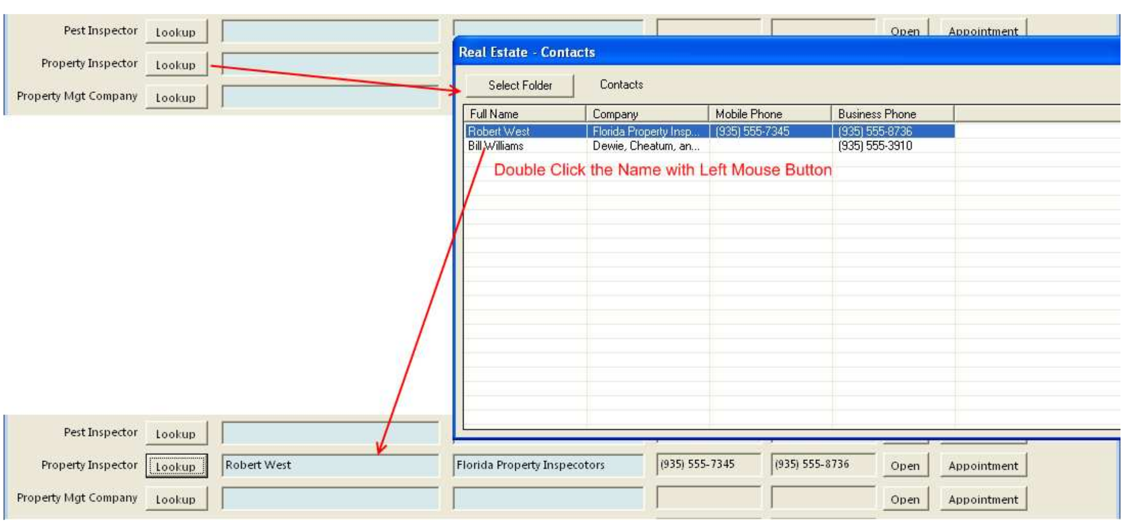


Contacts Page

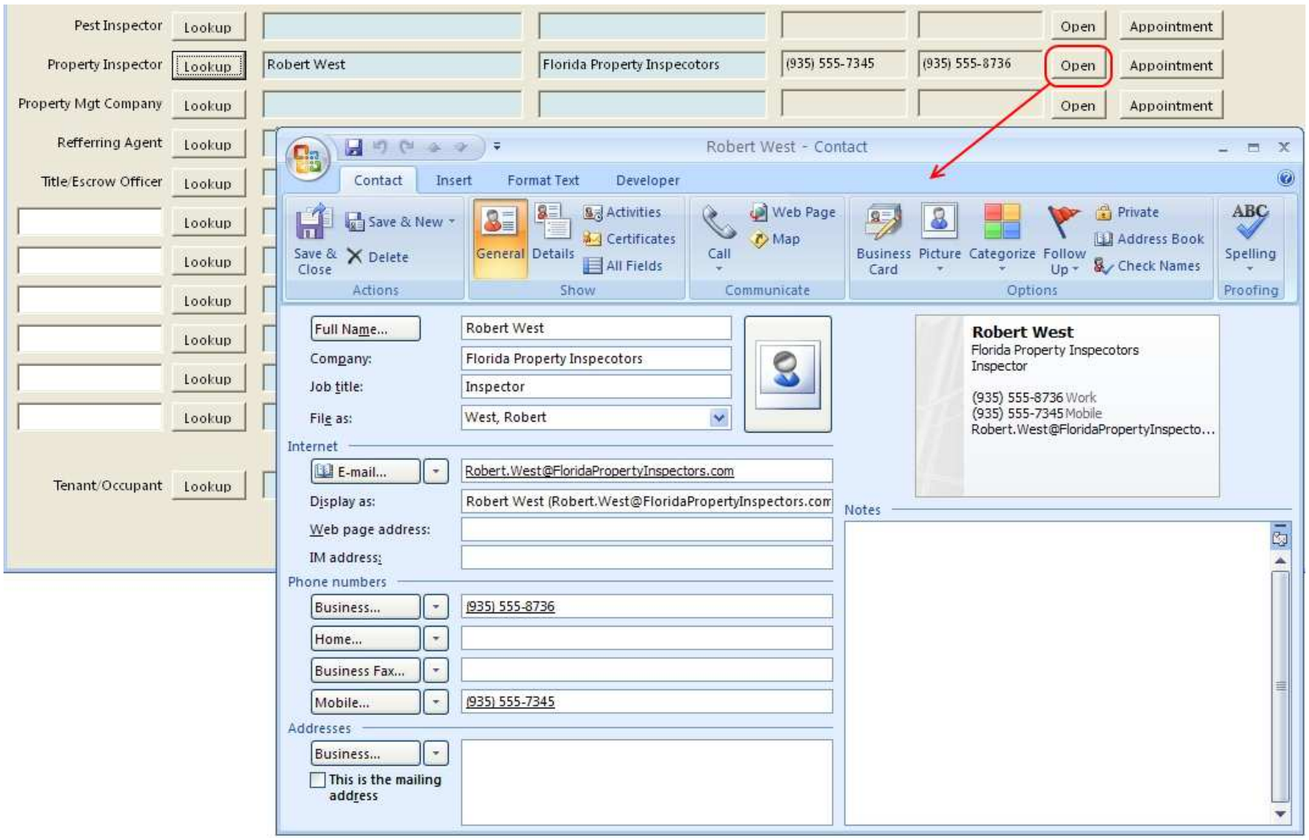
The Contacts page gives you the ability to associate other people that are critical to the success of the transaction – from the Buyer's Agent to the Attorney to the Inspector to other critical people.



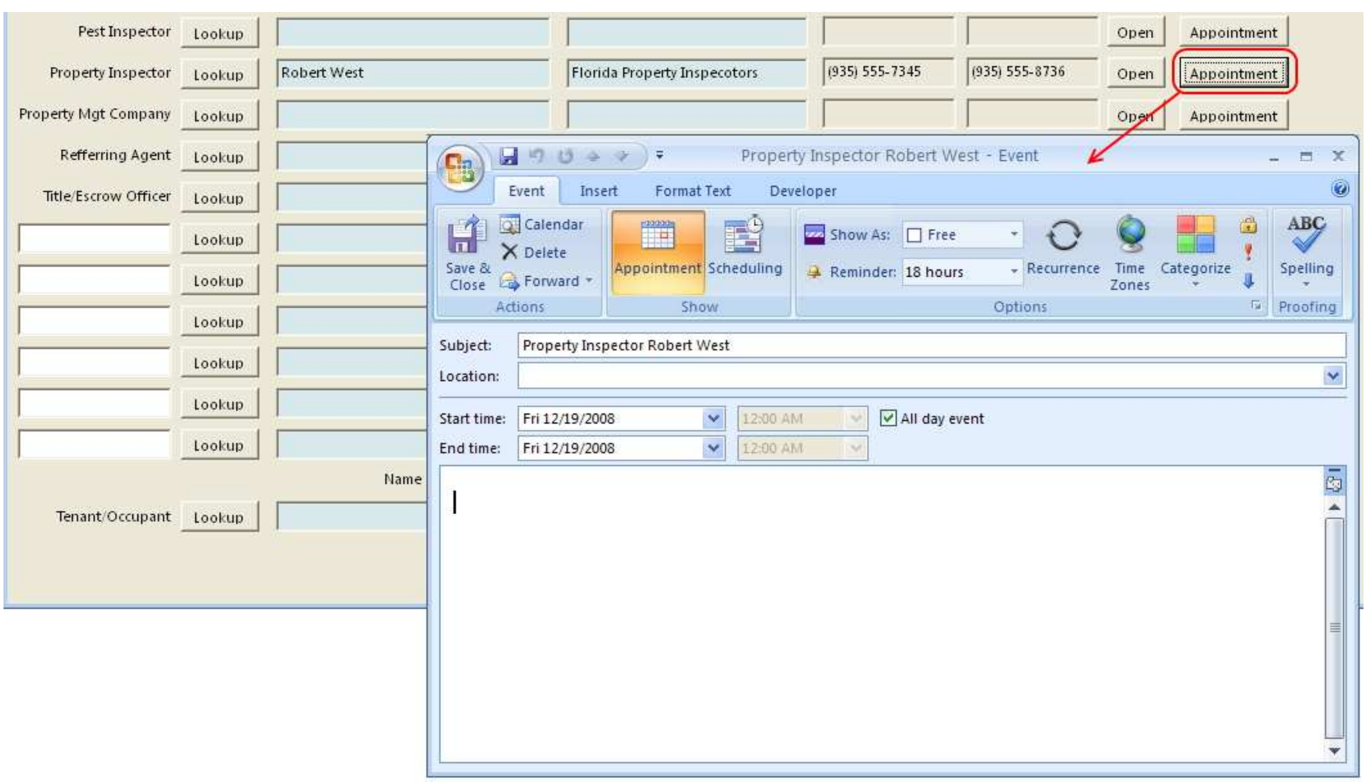
To associate a contact click the "Lookup" button. Select the contact and double click it with your left mouse button. Now the person is associated with this transaction.



To open the contact's Contact Form, click the "Open" button. This is useful if you need to send an email to the contact.



You can also set an appointment with the contact (e.g. the Property Inspector) by clicking the appointment button.

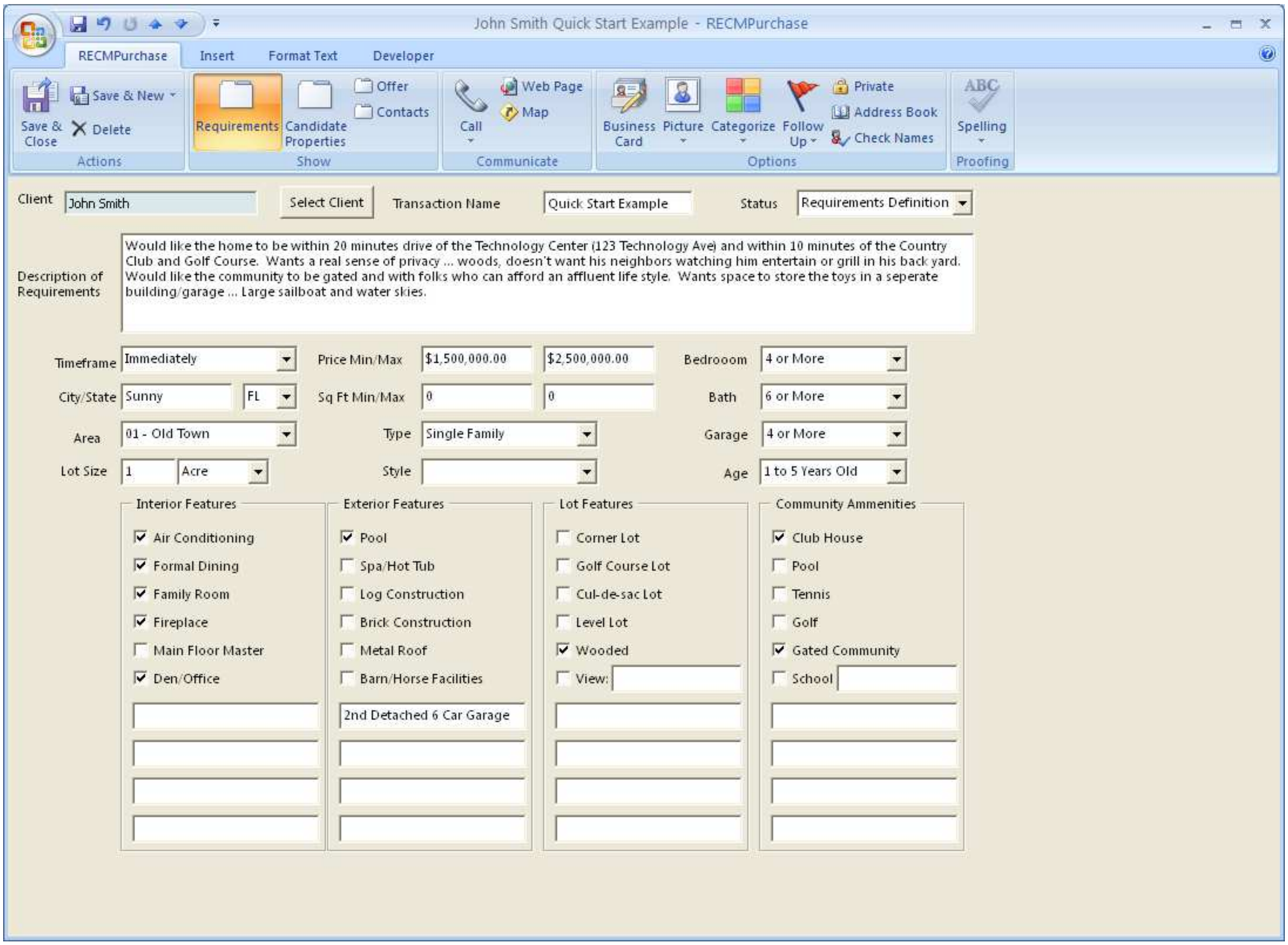


PURCHASE FORM

Forms for each Buyer Purchase transaction are kept in the Purchase folder. We strongly suggest that you only create Purchase Forms via the Client Form. This ensures that the each purchase transaction is properly associated with a specific client.

There are four main pages on the Listing Form: 1)Requirements; 2) Candidate Properties; 3) Offer; and 4) Contacts. This guide will give a quick overview of each.

REQUIREMENTS PAGE



1. CLIENT TO PURCHASE FORM RELATIONSHIP

At the top of the Requirements Page there are two critical fields: Client and Transaction Name. These two fields are combined (<client name> <transaction name>) to create a unique name for the transaction. In this case the Purchase Form would be named: “John Smith Quick Start Example”.

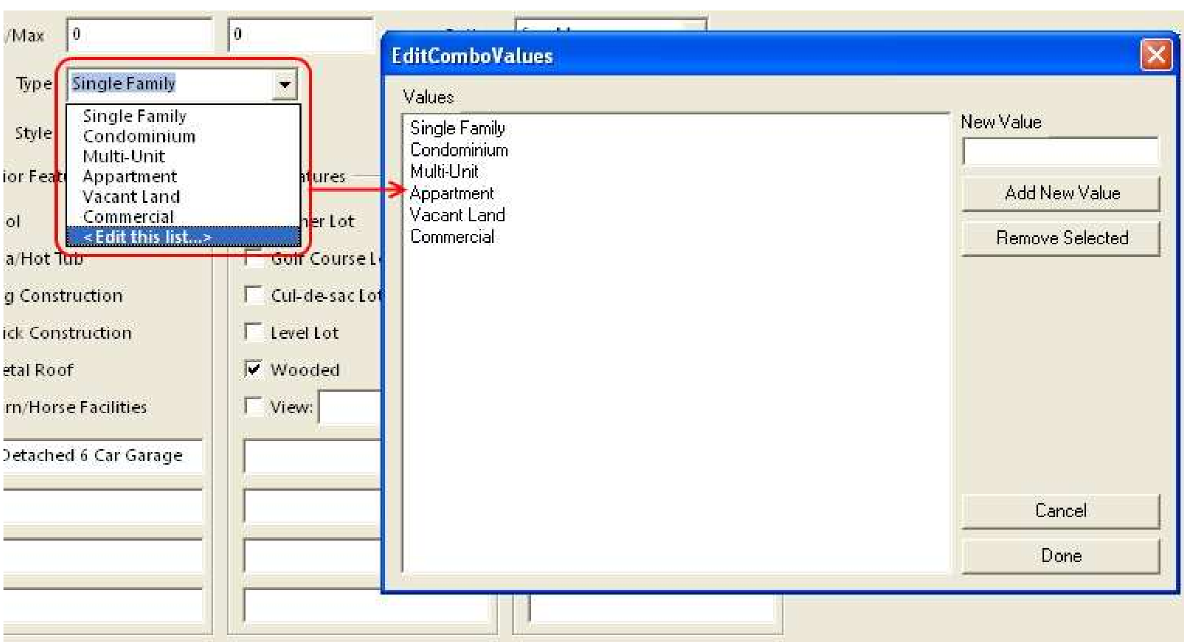
The Purchase Form is associated back to the client by the client name. If you create the Purchase form from the “New Purchase” button in the Client Form, then the Client’s Name is automatically filled in for you and a relationship established between that client and this purchase transaction. If you choose to create the purchase form another way (e.g. double clicking from within the purchase folder) then you’ll need to click the “Select Client” button and choose a buyer client to associate the purchase with.

When you initially create the Purchase Form, the Transaction Name is blank. You’ll need to enter a Transaction Name of your choice before you can save the form.

2. Requirements Page Fields

None the remaining fields on the Page are required … so, you can decide whether to fill them in or not.

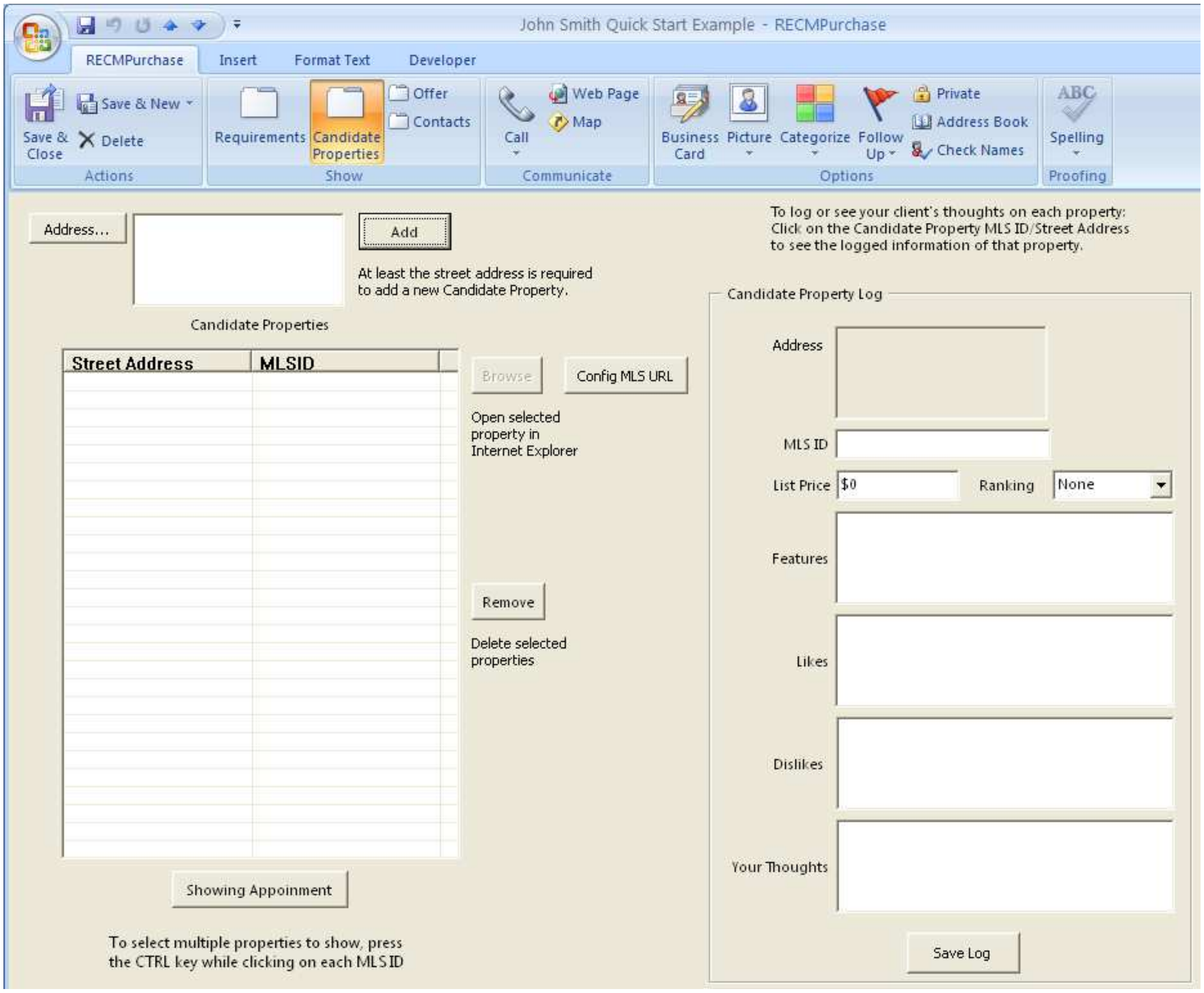
Some the fields are editable (Area, Type, and Single Family). If you enter information into these fields, the information becomes available for every form that uses that field. To edit a field, click the drop down, then click “<Edit this list…>”. This will bring up a window where you can add new values to the drop down list.



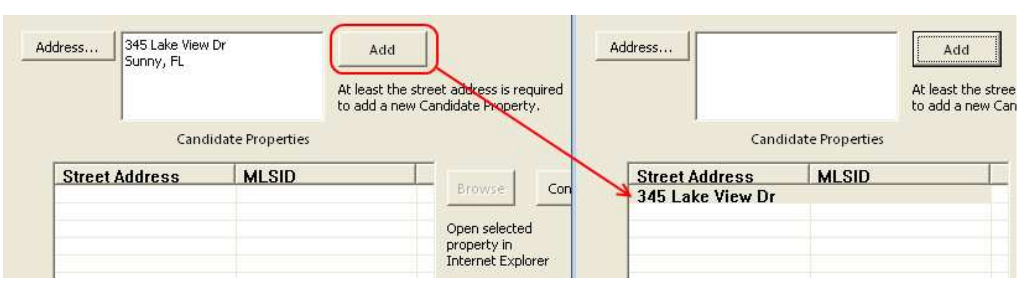
Candidate Properties Page

The Candidate Properties Page is a very powerful tool for helping you keep track of properties you plan to show your clients and their thoughts on the property. As the saying goes … We forget the details, but the computer never does.

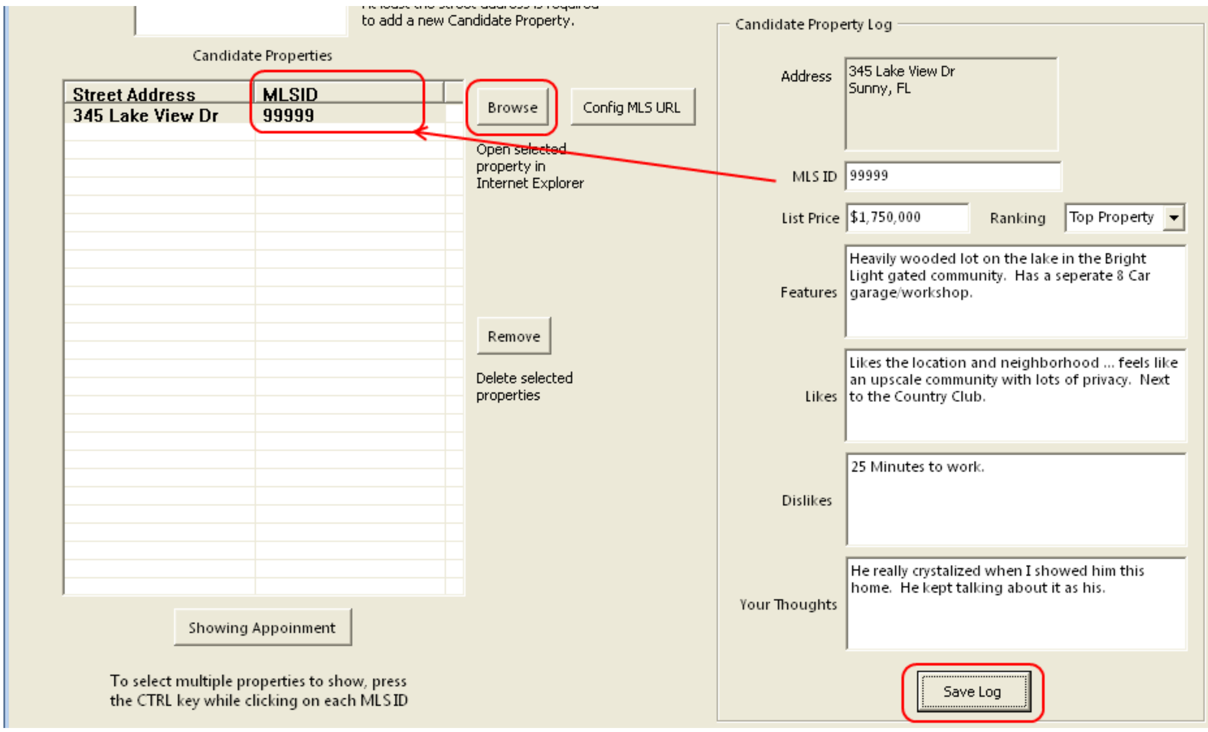
On the left side you can enter properties that you plan to show your clients. The right side allows you to log the MLS ID, Property Features, Client Likes/Dislikes and your thoughts on the property. You can also schedule Showing Appointments for specific properties.



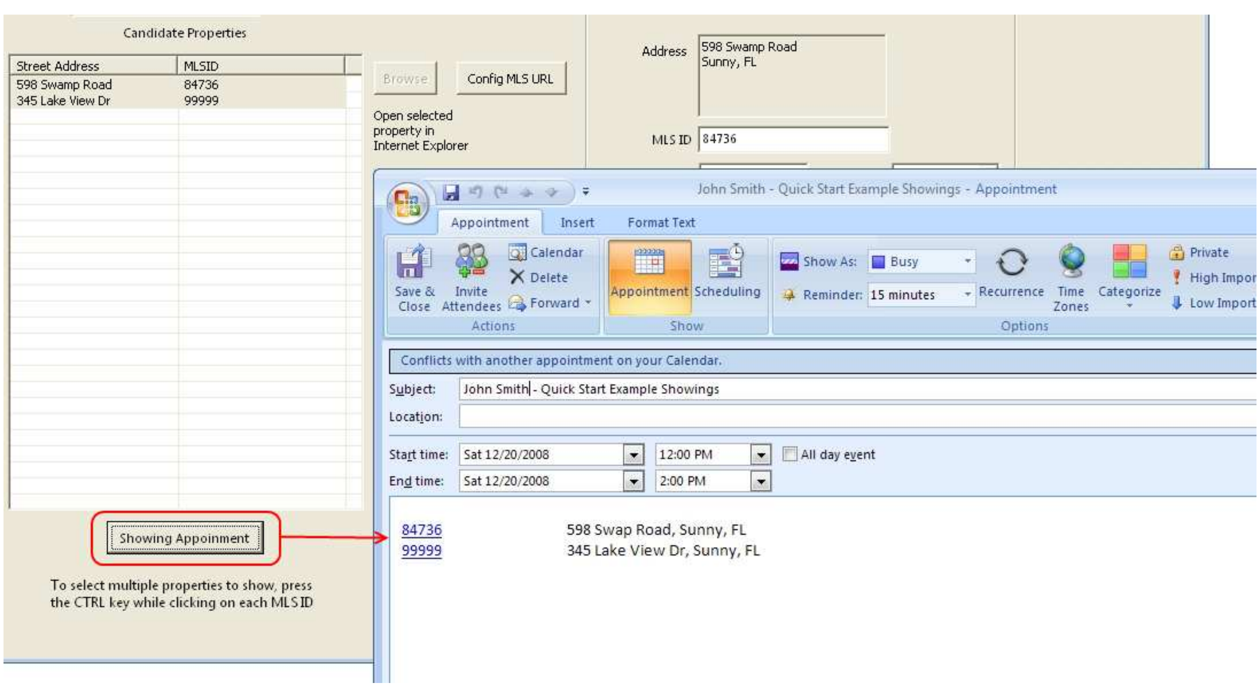
1. To log a property, enter the address and click "Add". The property is then placed on the list of candidate properties.



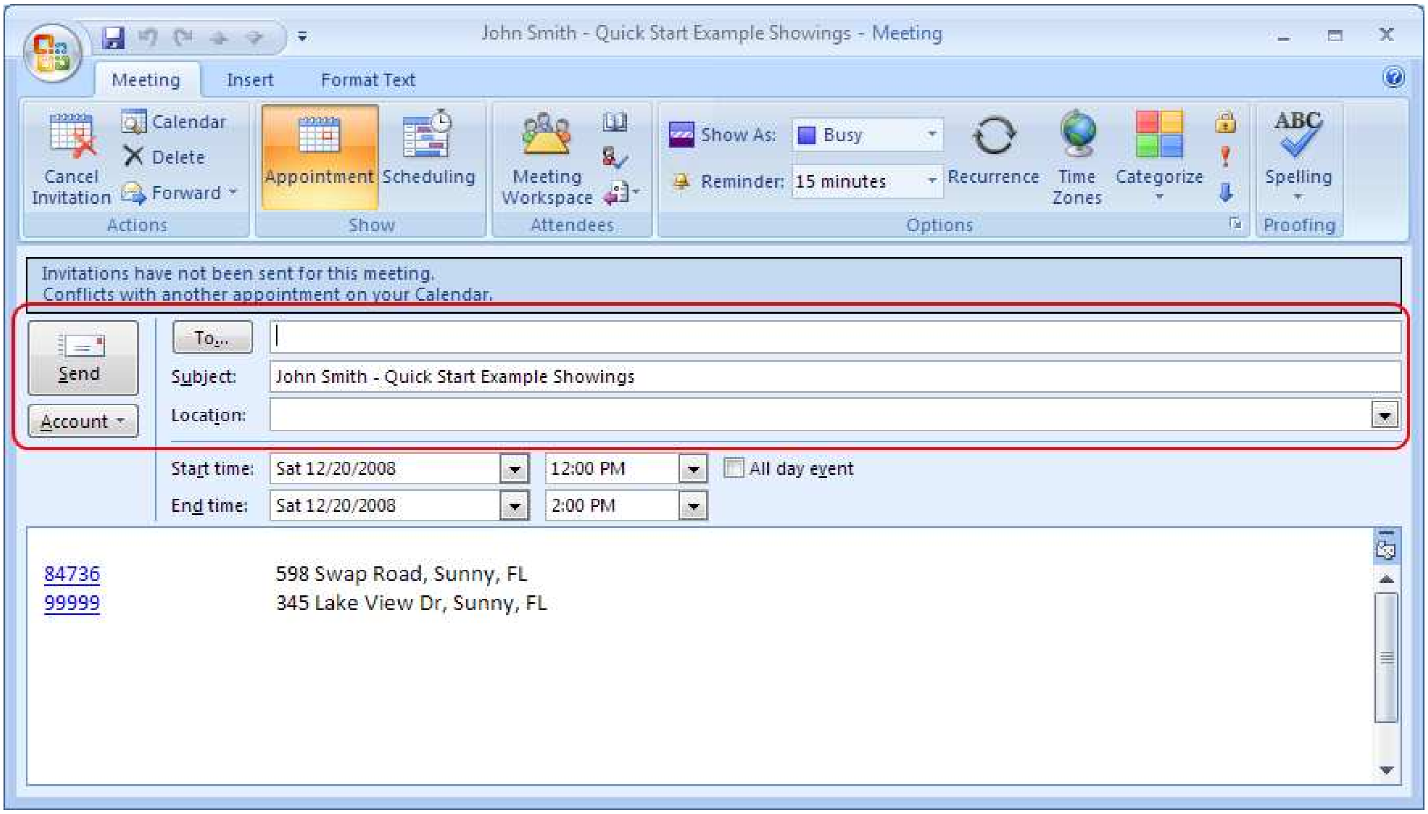
2. Once you've added the property, you can log the information on the property. Click the "Save Log" to save the information. Notice that if you enter an MLS ID, that ID is place next to Candidate Property address. If there is an MLS ID, you can press the "Browse" button to open the property on Realtor.com. If want to change so property is shown on a different website (e.g. if you know how to configure access to your MLS), then click the "Config MLS URL" and enter the access URL. The URL for Realtor.com is: http://www.realtor.com/search/searchresults.aspx?mlslid={0}



3. To setup a showing appointment, press the CNTRL key while clicking on the properties you want to setup a showing appointment for. This will create an appointment. Notice that the appointment includes the properties you selected in the notes area. If you've entered an MLS ID, then the link to the property on Realtor.com is embedded – clicking on it will open the property on Realtor.com in Internet Explorer.

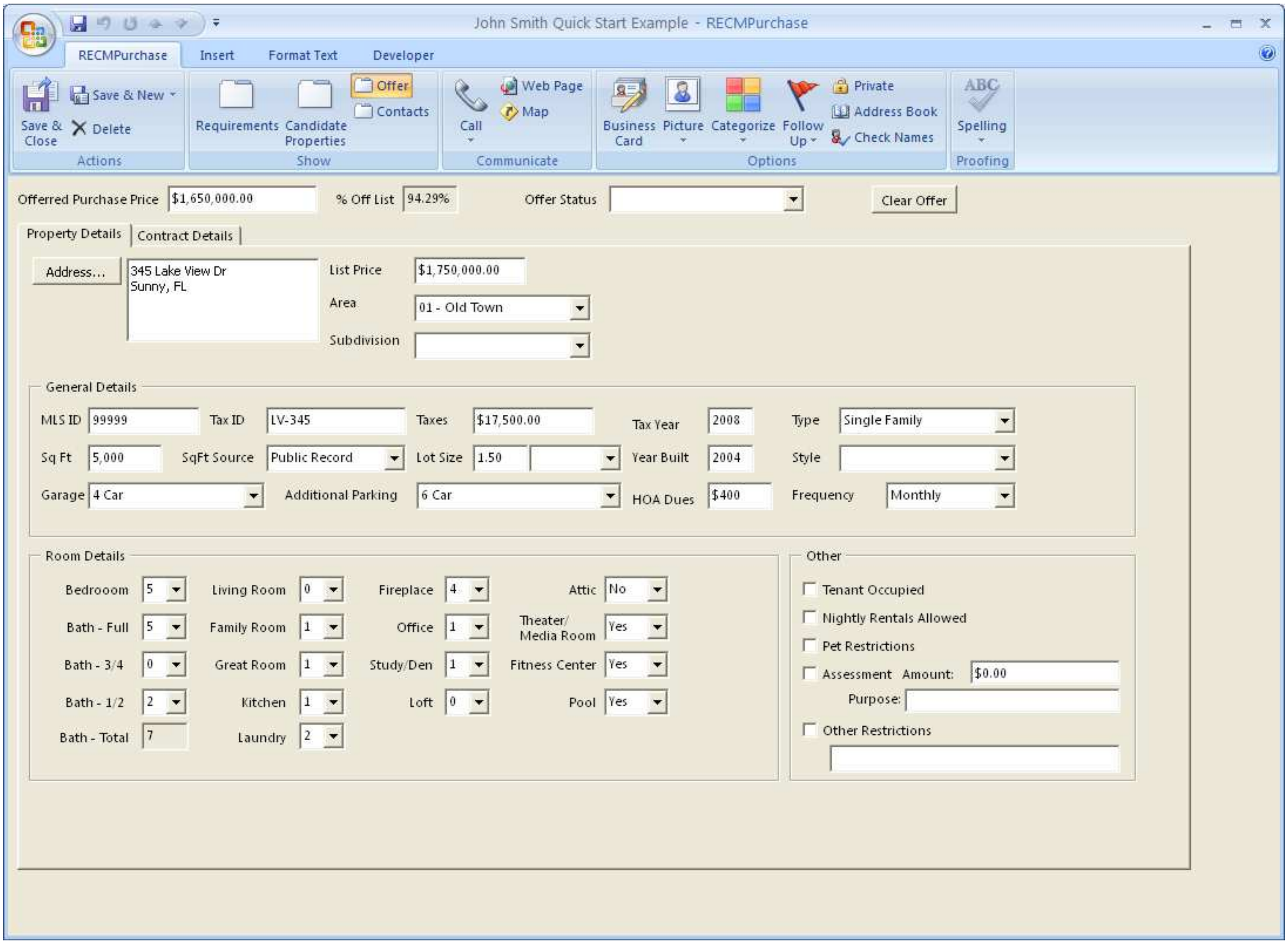


Notice that you can also "Invite Attendees" (Outlook 2007). In Outlook 2003, select File/Email. If you click that button, if will allow you to email your client the showing appointment.



Offer Page

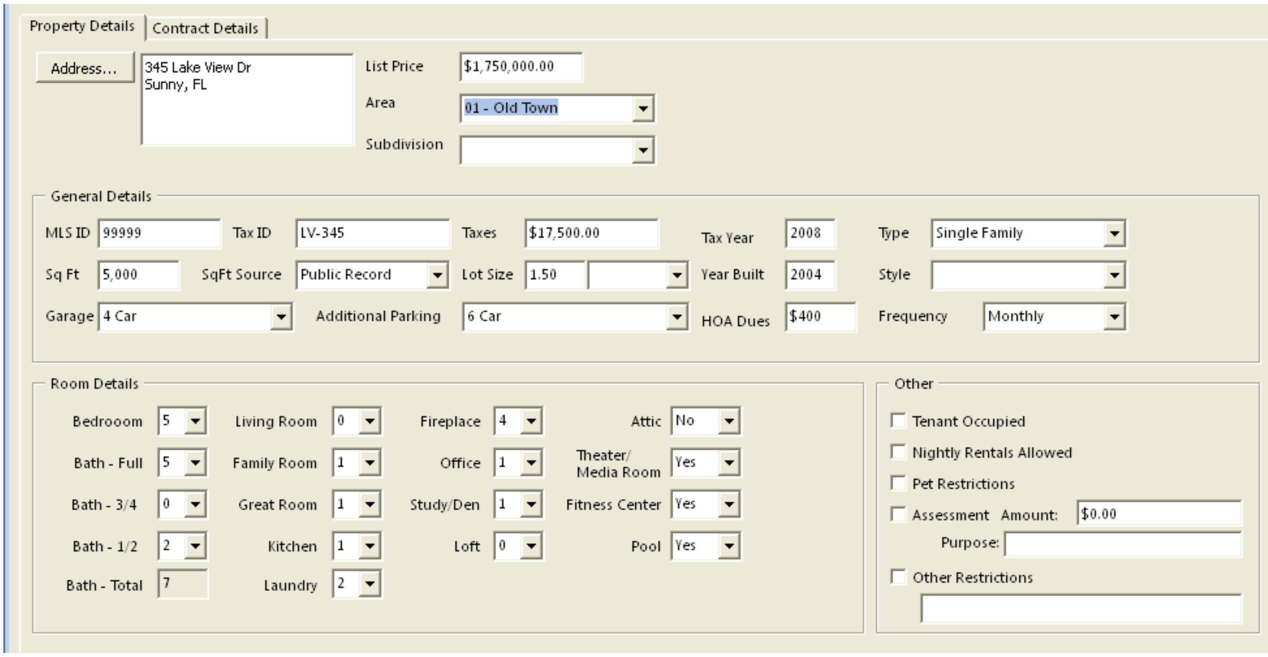
The Offer Page allows you to track critical details on an offer your buyers are making on a property. Notice in the upper right corner there is a "Clear Offer" button. If their offer falls through, you can clear all the details of the offer including appointments by pressing this button.



Noted that at the top of the Page is information the offered price. If you've entered the List Price on the Property Details Tab, it also shows the difference between the offer and the list price.

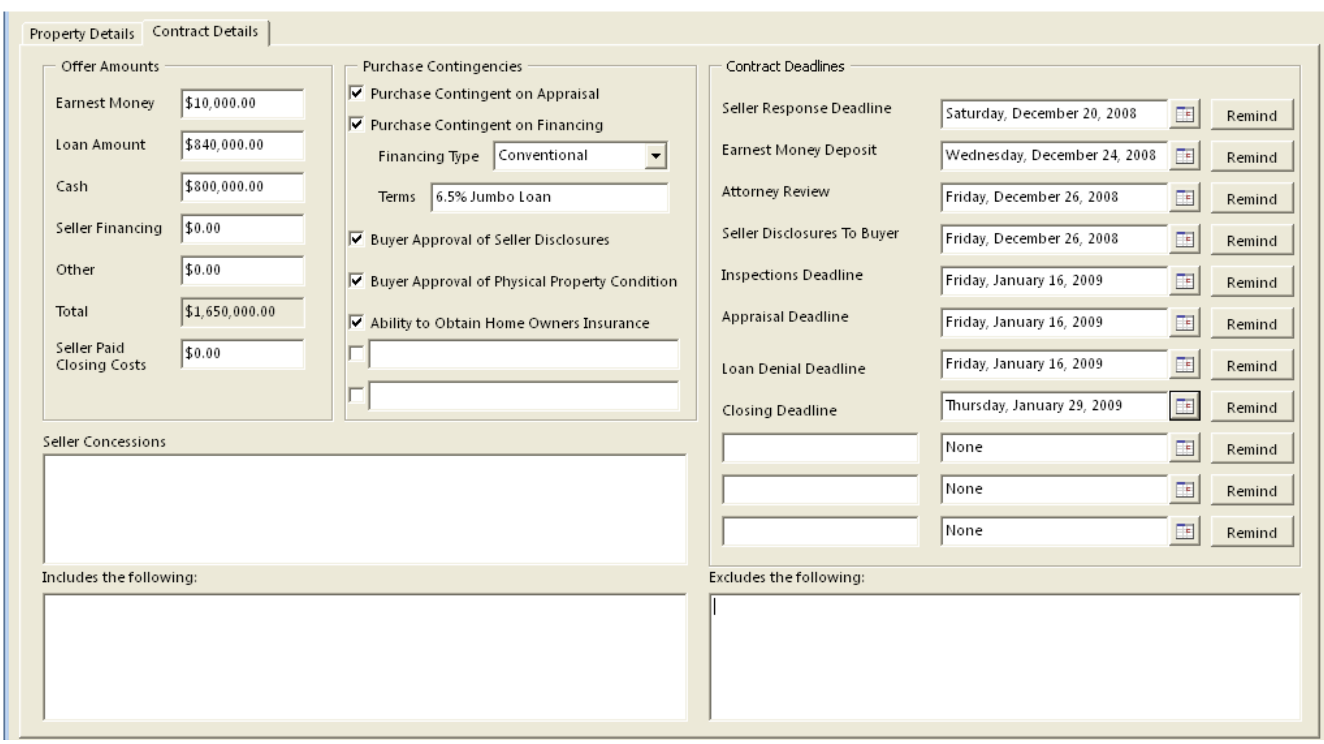
1. PROPERTY DETAILS TAB

Allows you to keep track of the specifics of the property your Buyer has submitted an offer on. You can add as much or as little information as you deem necessary. But, would suggest filling out at least the property address and the List Price.



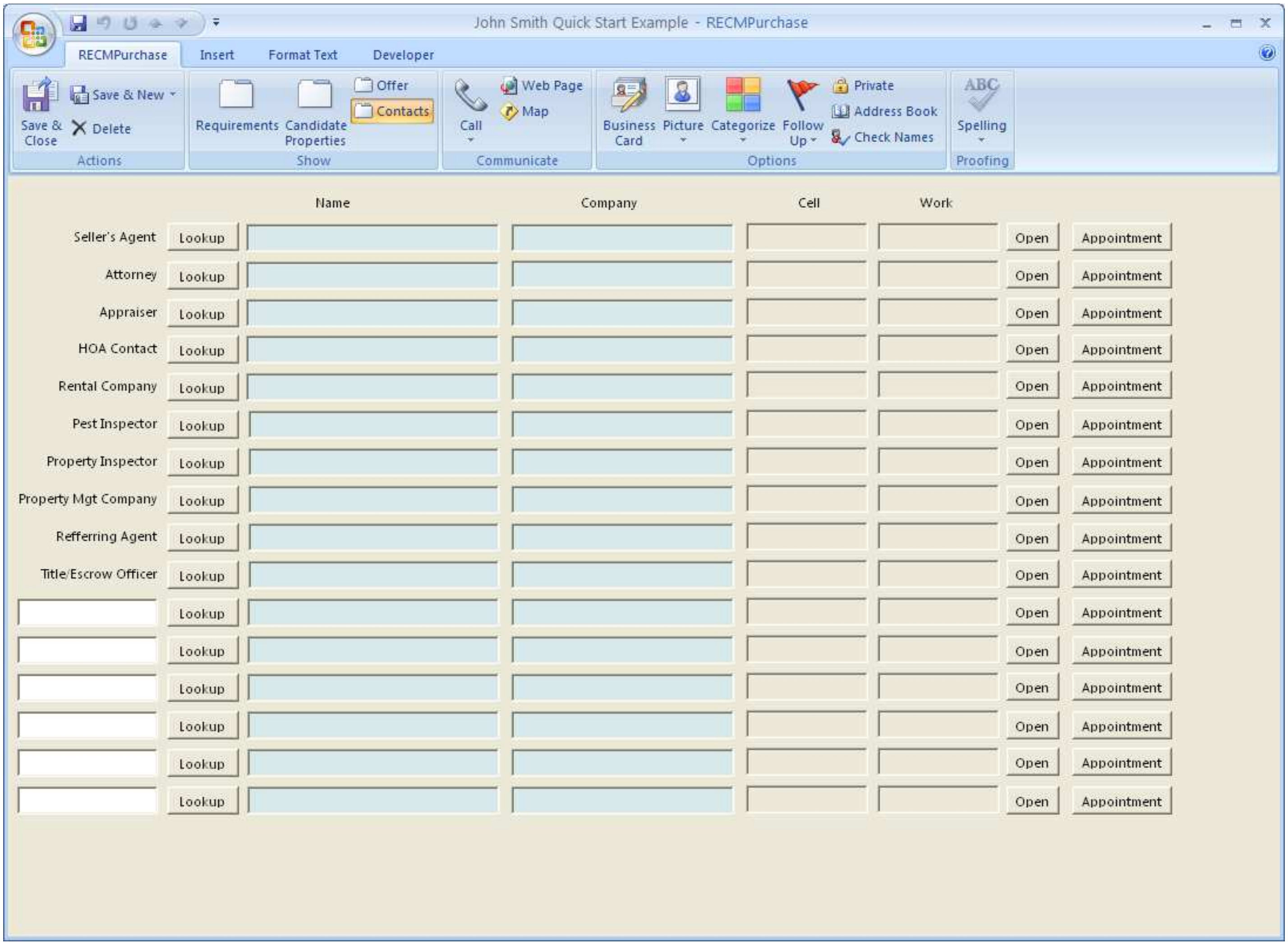
2. CONTRACT DETAILS TAB

The contract details tab allows you to keep track of critical details (including Seller Concessions and what will be included/exclueded) and events associated with the offer. This includes setting dates and reminders for contract deadlines. To set a deadline, enter the date (or select it from the Calendar Date Picker) and the click the "Remind Button".

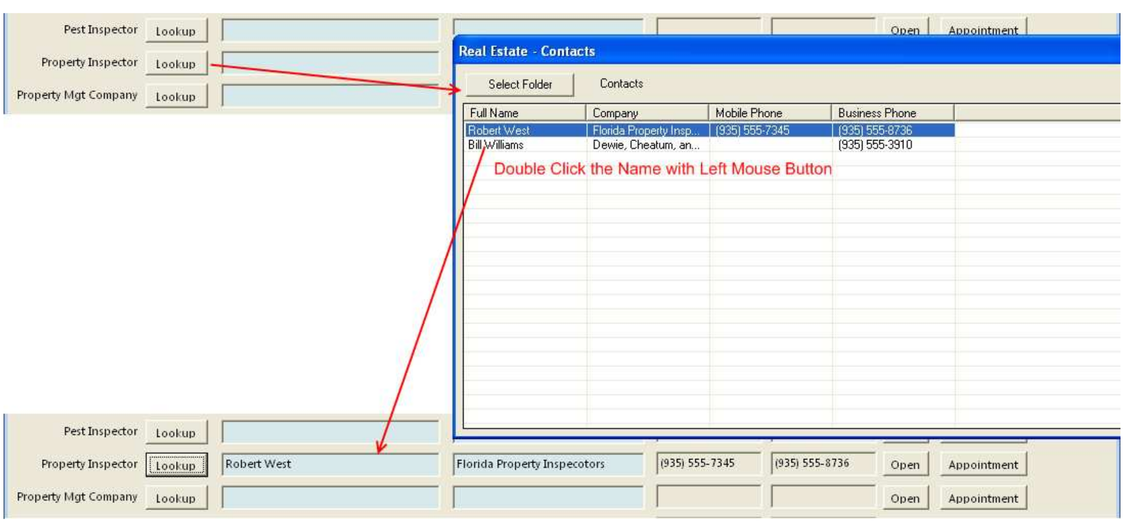


CONTACTS PAGE

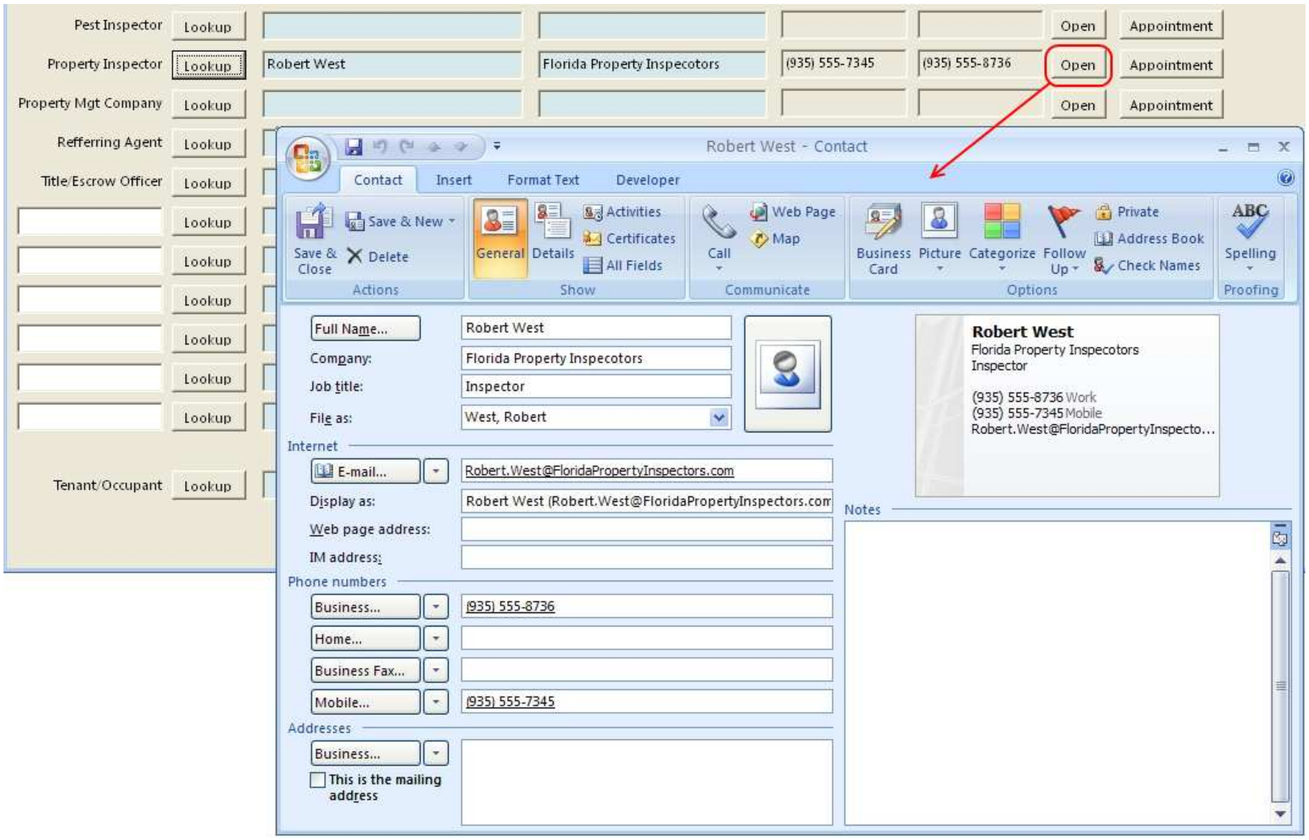
The Contacts page gives you the ability to associate other people that are critical to the success of the transaction – from the Seller's Agent to the Attorney to the Inspector to other critical people.



To associate a contact click the "Lookup" button. Select the contact and double click it with your left mouse button. Now the person is associated with this transaction.



To open the contact's Contact Form, click the "Open" button. This is useful if you need to send an email to the contact.



You can also set an appointment with the contact (e.g. the Property Inspector) by clicking the appointment button.